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UNITED NATIONS



ECONOMIC BULLETIN FOR EUROPE

FIRST QUARTER, 1949

Vol. 1, No. 1

Prepared by the

RESEARCH AND PLANNING DIVISION
ECONOMIC COMMISSION FOR EUROPE

GENEVA, July 1949



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This is the first issue of a BULLETIN intended to provide a regular review of the economic situation of Europe in the intervals between the publication of the annual ECONOMIC SURVEY OF EUROPE. In future three issues of the BULLETIN will be published annually, in July, October and January, covering the first, second and third quarters of the years respectively. The analysis of economic developments in the fourth quarter of the year will be included in the ECONOMIC SURVEY OF EUROPE (which will in the future, as in the past, be published at the end of April). In addition to the general review of economic developments in the quarter and the compendium of European Economic Statistics on which it is based, the BULLETIN will contain special articles on particular subjects related to the problems of the European economy.

The BULLETIN, which is prepared by the Research and Planning Division of the Economic Commission for Europe, is published entirely on the responsibility of the Secretariat of the Commission, and its contents, which are intended for the use both of Governments and the general public, have not been submitted to the member Governments of the Commission before publication.

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ECONOMIC BULLETIN FOR EUROPE

First Quarter 1949

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REVIEW OF THE ECONOMIC SITUATION IN EUROPE, JANUARY-MARCH 1949

GENERAL SUMMARY

THE economic recession in the United States—which by the end of the quarter involved a fall in industrial production of 6 per cent from the level of the previous quarter—had no marked effect on the domestic economic situation of European countries during the first quarter of 1949. Industrial production continued to rise at almost the same exceptionally high rate as during 1948, the increases being largest in France, Germany and Norway. For Europe as a whole, the increases were most pronounced in the coal and steel industries. In most countries, however, there was an increase in the number of unemployed in relation to the corresponding period of the previous year, which reflects the continued relaxation of inflationary pressure. The volume of exports and imports of European countries remained at the level reached at the end of 1948, but the previous trend towards a reduction in the dollar gap was reversed. Exports to the United States and Canada fell and imports rose, with the result that Europe's trade deficit with North America increased substantially in comparison with the last quarter of 1948. Exports to other overseas areas continued to increase. Intra-European trade decreased more than can be accounted for by seasonal factors, the decline being mainly concentrated in trade between the industrial countries of Western Europe. The level of wholesale prices remained stable in most European countries.

As regards the second quarter of the year, such preliminary indications as are available appear to show a failure of exports to register the strong seasonal rise that normally occurs in this period of the year. Except in the United Kingdom, where wholesale prices still continue to rise, the level of prices is falling moderately in most European countries. While there are no indications of any marked slackening in the volume of European production, uncertainty has been caused in a number of countries by the widening of the dollar gap owing to a sharp fall in exports to the United States.

Industrial Production

In the first quarter of 1949, industrial production in Europe continued the swift upward movement which it had followed in the previous year. The level of industrial production for Europe as a whole (excluding the U.S.S.R.) was 3 per cent greater than in the last quarter of 1948, and it thus increased only slightly less than in the corresponding period of the previous year, when there was an increase of some 4 per cent from the last quarter of 1947 to the first quarter of 1948. As is shown in Table 1—where the level of production in each of the last four quarters has been expressed as a percentage of the production in the corresponding quarter of the preceding year—

the level of industrial production reached by Europe as a whole in the first quarter of 1949 was 16 per cent above that in the first quarter of 1948; this yearly rate of increase compares favourably with the preceding three quarters. In the Union of Soviet Socialist Republics the high rate of progress achieved in the past year was maintained and the gross value of industrial production was 23 per cent above that of the corresponding quarter of 1948.

These high percentage increases in the total industrial production of Europe are strongly influenced, however, by the rapid industrial recovery of Western Germany. If Germany is excluded, industrial production in the rest of Europe in the first quarter of 1949 was only 9 per cent above the level in the corresponding

Table 1
INDUSTRIAL PRODUCTION
Index numbers—corresponding quarter of previous year = 100

Country	1948			1949
	Second quarter	Third quarter	Fourth quarter	First quarter
Austria	148	145	158	127
Belgium	109	105	108	108
Czechoslovakia	115	117	116	110
Denmark	120	109	110	107
Finland	121	121	108	105
France	115	115	119	113
Germany : Western zones	125	146	174	174
Greece	100	107	119	117
Ireland	124	113	109	104
Italy	99	101	109	105
Netherlands	119	119	114	115
Norway	113	103	107	110
Poland	134	125	120	111
Sweden	103	104	105	104
United Kingdom	111	106	106	108
Total of above countries :				
including Germany	114	113	117	116
excluding Germany	112	109	111	109
U.S.S.R.	124	123	129	123

Source: The figures are derived from Table I in the section, "European Economic Statistics."

quarter of the previous year and thus showed an annual rate of increase slightly below the corresponding figure for the preceding quarter. The same is true of most countries individually. As is shown in Table 1, the annual rates of increase are, in most cases, below those for the preceding quarter. In a number of countries, however, there was a steady upward movement of production from month to month during the quarter, as can be seen from Table I¹ (page 26). For Western Germany the production index for the first quarter of 1949 was 12 per cent higher than in the last quarter of 1948, but this level was already reached in the month of January 1949, and there was no further increase in the following two months.

¹ The references to tables with roman numerals are to those given in the section "European Economic Statistics" below.

The progress in production during the quarter (as shown in Table 2) was greatest in the production of coal and steel. Coal production rose by no less than 6 per cent as compared with the previous quarter and the production of crude steel by 7 per cent. For the whole of Europe, excluding the U.S.S.R., the output of coal in March came very close to the 1938 level, and the output of crude steel in the quarter exceeded the pre-war level for the first time since the war. In regard to coal, the unusually large increase in production in comparison with the last quarter of 1948 was to some extent a reflection of the temporary stoppage of French coal production in the month of October.

In electric power, there was a continued increase in production in most countries which was, however, offset by a fall in production in Italy and Switzerland

Table 2
SUMMARY OF INDICATORS OF PRODUCTION
Index numbers based on 1938 and 1947

Item	Europe, including Germany ^a							Europe, excluding Germany ^a						
	Average 1947 = 100					Aver-	age 1938 = 100	Average 1947 = 100					Aver-	age 1938 = 100
	1947	1948		1949	1949			1947	1948		1949	1949		
	Fourth quarter	First quarter	Second quarter	Third quarter	Fourth quarter	First quarter	First quarter	Fourth quarter	First quarter	Second quarter	Third quarter	Fourth quarter	First quarter	First quarter
General index of industrial production ^b	107	112	116	114	125	129	108	107	111	114	109	119	121	120
Coal	105	108	110	108	112	119	95	104	107	109	104	108	116	102
Electric power	107	113	107	107	121	121	150	106	111	107	105	118	117	162
Crude steel	112	120	127	133	141	151	102	108	116	122	123	128	136	135
Engineering industries ^b	109	115	121	117	134	139	112	108	114	119	110	124	127	135
Motor vehicles ^b :														
Passenger	108	123	136	129	143	169	87	107	121	133	124	134	156	102
Commercial	106	115	119	117	144	150	197	106	113	118	110	133	137	211
Chemical industries ^b	108	116	121	123	131	137	117	109	116	120	116	124	128	148
Textile industries ^b	109	113	116	112	126	130	97	109	112	114	105	118	120	103
Building bricks ^b	121	96	112	152	141	106	55	120	97	110	136	124	97	57
Cement	107	102	124	135	127	119	83	105	99	119	125	115	108	97

Source: The figures are derived from Tables I to X in the section "European Economic Statistics."

^a Figures relate to present territory for pre-war and post-war years and exclude the U.S.S.R.

^b The index numbers are based on a sample of European countries.

caused by unfavourable weather conditions. In Italy, the resulting shortage of power had adverse effects on the general level of industrial production. In general, however, the increase in coal and electric power production, combined with the exceptionally mild winter, prevented European industry from becoming seriously short of fuel.

The production of the engineering industries, which is shown in Table II, rose substantially in Germany, but in the rest of Europe the increase in production of 2 per cent from the fourth quarter of 1948 to the first quarter of 1949 was definitely smaller than in the corresponding period of the previous year. Within the engineering industries there was an exceptional increase in the output of passenger motor cars, which, in Europe as a whole, increased by 18 per cent in comparison with the previous quarter or by 37 per cent in comparison with the first quarter of 1948.

In the chemical industries, as in the engineering industries, the rise in total production in Europe excluding Germany was less than a year ago. There

was a remarkable increase in output in Norway as a result of improved supplies of power, and there were considerable increases in France and the United Kingdom. In several other countries, however, chemical production declined. In the textile industries, total European production continued to increase at the same rate as in the corresponding period of the previous year.

Although the rise in production slowed down in some countries and there may have been a more than seasonal slackening in some industries, the over-all picture shown by the various data does not indicate that the economic recession in the United States—where industrial production fell by 4 per cent during the quarter and was on the average 3 per cent lower than in the last quarter of 1948—had any marked influence on the economic conditions of Europe in the first quarter of 1949.

Although the figures for total unemployment (as shown in Table XI) were in most countries distinctly higher than in the corresponding quarter

of 1948, unemployment was still at a remarkably low level in relation to pre-war years, with the exception of a few countries (such as Ireland, Italy, Belgium or Western Germany), where it had already assumed more serious proportions in the previous year. The rise in unemployment appears to have taken place mainly in the service industries, the demand for which was artificially swollen during the period of post-war inflation.¹ In industry, the level of employment, which is shown in Table XII, remained virtually unchanged in Europe as a whole, a reduction of some 2 per cent in the case of Switzerland and Belgium being offset by slight increases in a number of other countries.

While the maintenance of a high level of employment and production in industry may be taken as an indication of the continuation of a high level of effective demand in the first quarter, it also reflects the continued improvement in the supply of primary materials to industry. In addition to more adequate supplies of fuel, there was a distinct improvement in the supply of certain raw materials. Thus, the large increase in the production of passenger motor cars reflects the improvement in steel supplies, and in at least two other fields there was also a marked improvement in the supply position during the quarter. Imports of oil seeds and nuts, which in 1948 had remained at only one-third of pre-war, increased by 50 per cent over that level during the quarter. At the same time fellings of timber for pulp increased substantially in Norway, where the pulp mills have hitherto been working far below capacity. As a result, the prospective shortage of wood pulp in Europe appears for the time being to have been eliminated.

Prices

The level of wholesale prices, which was stabilized in most European countries in the latter half of 1948, continued to be stable in the first quarter of 1949, as can be seen from Table XIII. In two countries, Belgium and France, wholesale prices declined in the course of the first three months of the year by about 5 per cent. In Western Germany and Greece, where there had been a continuous rise up to the end of

¹ It may be significant that the only country in which unemployment in the first quarter in 1949 was smaller than a year ago is Norway, where there has so far been no definite indication of a reduction in inflationary pressure.

1948, prices became stabilized and there was no further increase in the first few months of 1949.

On the whole, the relative prices of the different economic sectors have also remained fairly stable, with the important exception of France, where the prices of agricultural products continued to decline in relation to industrial prices, although the latter have also fallen somewhat since January 1949.

Special price indices for import and export commodities are available for only a few countries. These appear to indicate (as shown in Table XIV) that the slight declining tendency in import and export prices, which had already begun in 1948, continued in 1949.

The downward movement was most acute in the case of Swedish export prices, in which the softening of prices of pulp and paper in overseas markets played an important role. Pulp appears to be the only example of a heavy decline in the price of a staple commodity exported from European countries. A slight decline in prices took place for the first time since the war in some other important fields. Prices for timber exports from Scandinavia to the United Kingdom have, on the average, declined by 4 per cent compared with the prices obtained in 1948, and the prices for Polish coal have also been slightly reduced. The prices of animal fats and oils show likewise a declining trend in accordance with the rapidly improving supply position. As far as can be judged, however, from the figures so far available, the heavy decline in raw material prices in the United States has not so far had any commensurate effect on the prices of raw materials in European countries.

General Trend of Trade

The over-all volume of exports and imports of European countries showed little change from the last quarter of 1948 to the first quarter of 1949. On the basis of data covering about 90 per cent of the trade shown in Table XV, it appears that the total volume of imports has tended to remain remarkably stable for the last year and a half at around 10 per cent less than 1938. On the side of exports, the lack of a further rise in the total volume is not in itself to be regarded as an unfavourable development, if account is taken of the seasonal tendency for the exports of some countries or of particular commodities to decline in the winter months. Moreover, the level of exports reached at the end of 1948 was

very high in relation to that of preceding quarters and represented an annual rate roughly the same as in 1938.¹

This apparent stability in the over-all foreign trade of European countries was, however, the result of divergent tendencies. British exports continued to expand and during the quarter reached an average level of 156 per cent of pre-war (or 4 per cent above the planned level for 1952/53). French exports rose even more strongly from 106 per cent of the 1938 level in the last quarter of 1948 to 127 per cent in the first quarter of 1949. In both countries imports showed little change. On the other hand, Swiss foreign trade, both exports and imports, declined abruptly, and Italian exports receded from the relatively high post-war level which had been reached toward the end of 1948. There was also a sharp decline in Swedish exports, which can be largely attributed to seasonal factors.

Increase in the Dollar Gap

The divergent tendencies in Europe's trade are also brought out in Table 3, showing the geographical distribution of the trade of ten Western European countries which together accounted for some 80 per cent of total European trade in 1948. It appears that, while total exports and imports remained stable, there was a slight decline in intra-European trade and an increase in trade with overseas countries. Within overseas trade there was, however, a notable difference in the movement of trade with the dollar area and trade with other overseas areas. Most of the countries for which data are available increased their imports from North America, which had been steadily declining during the preceding year. Imports of cotton from the United States played a significant part in the rise.

At the same time, European exports to the United States and also to Canada, which had been increasing steadily during 1948, declined by some 12 per cent during the first quarter of 1949, whereas exports to other overseas countries continued to expand. The decline in shipments to the United States extended not only to almost all European exporting countries

¹ Figures based on total European trade rather than the sample of 90 per cent covered here would show a somewhat lower level owing to the particularly low volume of trade of the countries excluded, cf. footnote f to Table XV.

Table 3

TRADE OF TEN WESTERN EUROPEAN COUNTRIES BY AREAS OF ORIGIN AND DESTINATION

Millions of dollars in current prices

Item	1948 Fourth quarter	1949 First quarter	<i>First quarter 1949 as per cent of fourth quarter 1948</i>
Imports from U.S. and Canada, c.i.f.	1,122	1,237	110
Exports to U.S. and Canada, f.o.b.	328	288	88
Imports from other overseas areas, c.i.f.	2,266	2,294	101
Exports to other overseas areas, f.o.b.	1,911	2,063	108
Imports from Eastern Europe, ^a c.i.f.	227	237	104
Exports to Eastern Europe, ^a f.o.b.	177	173	98
Imports from rest of Europe, c.i.f.	2,073	1,995	96
Exports to rest of Europe, f.o.b.	2,070	2,037	98
TOTAL imports, c.i.f.	5,688	5,763	101
TOTAL exports, f.o.b.	4,486	4,561	102

Source : The figures have been derived from Table XVI in the section "European Economic Statistics."

^a Including the U.S.S.R.

Table 4

THE COMMODITY COMPOSITION OF EUROPE'S^a EXPORTS TO THE UNITED STATES*Millions of dollars in current f.o.b. prices*

Commodity	1947	1948				1949
	Quarterly average	First quarter	Second quarter	Third quarter	Fourth quarter	First quarter
Food	21	32	29	27	38	30
Beverages	12	13	13	13	19	12
Tobacco and manufactures	14	12	14	13	12	11
Metals and manufactures	24	22	27	44	57	71
Wood, cork, paper and manufactures . .	34	47	39	32	25	23
Textiles and manufactures	28	46	44	47	45	40
Leather, fur and manufactures	17	16	22	21	16	12
Machinery	3	7	8	6	9	8
Vehicles and parts	2	6	9	10	11	6
Chemicals and related products	7	8	8	9	8	8
Clocks and watches	14	14	14	15	17	12
Precious stones and metals, jewellery, etc.	14	16	17	19	15	10
Art works and antiques	3	4	3	4	4	4
All other items	26	24	27	30	31	26
TOTAL	219	267	274	290	307	273

Source : United States foreign trade statistics.

^a Including the U.S.S.R.

but also to virtually all groups of commodities, as shown in Table 4. The only important exception, and the only item to show a significant expansion over the quarterly average for 1947, was "Metals and Manufactures", but this group includes large amounts of scrap iron from Western Germany and of steel-mill products from Belgium, exports of which can hardly be expected to continue on a large scale in view of the recent reduction of steel production in the United States.

As a result of these developments, the gradual improvement during 1948 in Europe's dollar balance of trade was reversed in the first quarter of 1949 (Table 5). At the same time, however, Europe's trade balance with overseas areas other than North America has continued to improve. In the first quarter of 1949 the deficit was no greater than could be accounted for by freight charges on imports (reckoned c.i.f.) which, in fact, accrue primarily to European carriers. After adjustment for this item, the United Kingdom and Italy would show a substantial export surplus in trade with overseas countries other than the United States and Canada, and

only the Bizonal Area of Germany would have a substantial deficit.

Intra-European Trade

It is particularly difficult to distinguish between the effects of seasonal and of other influences in the development of intra-European trade during the first quarter of the year. Among the trading relationships covered by Table XVI, the seasonal factor seems to have been most strongly expressed in the decline of roughly 30 per cent in value in the trade of the Scandinavian countries with each other, which nevertheless remained almost 50 per cent greater than in the first quarter of 1948. The trade of the Scandinavian countries, especially Sweden, with most other European countries also fell sharply from the fourth quarter of 1948 to the first quarter of 1949.

On the other hand, seasonal influences could hardly explain the fall of almost 15 per cent in trade among the four Western European industrial countries—France, the Netherlands, Belgium-Luxemburg and Switzerland. This decline included almost every pair

Table 5

TRADE OF TEN WESTERN EUROPEAN COUNTRIES WITH OVERSEAS COUNTRIES

Millions of dollars in current prices

Item	1947	1948				1949
	Fourth quarter	First quarter	Second quarter	Third quarter	Fourth quarter	First quarter
<i>Trade with United States and Canada :</i>						
Imports, c.i.f.	1,542	1,286	1,296	1,219	1,122	1,237
Exports, f.o.b.	243	246	274	298	328	288
Imports (c.i.f.) — Exports (f.o.b.) . . .	1,299	1,040	1,022	921	794	949
<i>Trade with other overseas countries :</i>						
Imports, c.i.f. . . . .	..	2,191	2,418	2,263	2,266	2,294
Exports, f.o.b. . . . .	..	1,378	1,653	1,679	1,911	2,063
Imports (c.i.f.) — Exports (f.o.b.) . . .	..	813	765	584	355	231

Source : The figures have been derived from Table XVI in the section, "European Economic Statistics."

of trading relationships within the group and brought the total value of trade among the four countries to a level no greater than that in the first quarter of 1948. The only significant exception was the expansion of French exports to the Netherlands, which was part of an unusual increase in French exports which extended to most countries, other than Belgium-Luxemburg, Switzerland and the United States. The decline in the trade of Switzerland with the group of Western European industrial countries was typical of the general downward movement of its trade with most areas. In the case of Belgium, on the other hand, exports to most other areas were generally maintained, and in some instances they definitely rose, notably to Germany. Imports into Germany from most other European countries, especially the Northern and Eastern group, also rose considerably and its export surplus in intra-European trade was moderately reduced.

In the field of East-West trade in Europe, two fairly general and sharply contrasting developments appear to have taken place in the first quarter. There was a pronounced fall in the imports of Western European countries from the Soviet Union to a level very much lower than a year ago while Western European imports from other Eastern European countries continued to

expand. Almost all Western European countries, of which the United Kingdom and Belgium were of chief importance, shared in the reduction in imports from the Soviet Union, and most of them, apart from Belgium and Switzerland, shared in the rise in imports from other Eastern European countries. Exports from Western Europe to Eastern Europe declined moderately in comparison with the previous quarter, but were substantially above the level of a year ago.

Trade in Selected Products

The recent trends which have been seen in the over-all volume and value of the foreign trade of European countries are also evident in the data on trade in individual commodities presented in Table XVII covering the eight countries which, in 1948, had the greatest turnover in foreign trade. In general, the total exports of each of the products by the group of countries as a whole changed only moderately from the preceding quarter, although they stood at a high level in relation to a year earlier. Compared with the

¹ The data cover each country's total imports and total exports of each of the items and thus include trade with other European countries as well as trade with overseas countries.

beginning of 1948, there were, for instance, increases of from one-half to three-fourths in exports of machinery, finished steel, and cotton yarn and fabrics, while exports of coal doubled. The greater part of these gains had already been achieved by the end of 1948, however, and in some products there was a slight recession in exports during the first quarter of 1949.

With regard to imports, purchases by the eight countries of most of the separate commodities listed maintained approximately the same stability as the over-all volume of imports. They were, however, in some cases considerably above, and in other cases considerably below, the level of the corresponding quarter of the previous year. Imports of cereals were at about the same level as at the beginning of 1948, whereas imports of meat, in which the United Kingdom is of predominant importance, were around 25 or 30 per cent less in both the fourth quarter of 1948 and the first quarter of 1949. On the other hand, imports of oil seeds and nuts, as already noted, were very much greater than in 1948. The increase was particularly marked in the case of Continental European countries which previously had been considerably less successful than the United Kingdom in obtaining supplies of these scarce commodities.¹

Imports of mineral oil were also substantially larger than at the beginning of 1948. As is shown in the following table, the increase is accounted for by

IMPORTS OF MINERAL OIL BY EIGHT EUROPEAN COUNTRIES ^a

(*Thousands tons on ton for ton basis*)

		Crude	Refined
1948	I	2,557	5,491
	II	4,246	6,214
	III	4,277	6,011
	IV	5,067	5,236
1949	I	5,216	5,367

^a Belgium-Luxemburg, France, Bizone of Germany, Italy, Netherlands, Sweden, Switzerland, United Kingdom.

imports of crude petroleum, reflecting the expansion in refining capacity in Europe, although imports of refined products have also tended to be maintained

¹ Cf. *Economic Survey of Europe in 1948*, p. 74.

because of the over-all growth in consumption requirements. Imports of finished steel and of machinery have fluctuated within relatively narrow limits since the beginning of 1948, while imports of both wool and cotton yarn have definitely fallen off. On the other hand, imports of cotton fabrics have risen to a volume almost 50 per cent greater than in the first quarter of 1948. All of this increase was accounted for by the United Kingdom, which is Europe's leading importer as well as exporter of cotton cloth. The increase in imports into the United Kingdom was primarily the result of an increase in supplies from Japan and Germany which more than compensated for the decline that took place in purchases from the United States and Belgium.

The rise in European production and the consequent increase in European supplies has made possible a reduction of Europe's exceptional dependence for certain products on the United States and other overseas suppliers. This has notably been the result of the recovery of production and exports of coal and steel by European countries.¹ It has also been true of machinery, although there was a rise in imports from the United States during the quarter in accordance with orders placed under the European Recovery Programme.

The commodity movements for individual countries as shown in Table XVII correspond to the trends revealed in the aggregate values of their exports and imports. In the case of Switzerland there was a remarkable general decline during the first quarter in both exports and imports of the items covered, the most striking decrease being in imports of the three textile groups, especially cotton yarn and fabrics. Italian exports of textiles and machinery weakened appreciably compared with the last quarter of 1948, but in general remained well above the levels of the beginning of that year. On the other hand, British exports of textiles as well as machinery continued a gradual expansion. The rise in French exports extended to most of the products covered and was especially pronounced in crude and finished steel. There has also been a notable increase in French imports of fuel, both coal and mineral oil. Belgian exports and imports were, in general, well maintained

¹ In the case of coal, the expansion in Polish exports from some 6,650,000 tons in the first quarter of 1948 to 8,300,000 tons in the first quarter of 1949 (which is not shown as a separate item in Table XVII) has been an important factor in reducing import requirements from the United States.

during the first quarter of the year. The trade figures for the Bizone of Germany show a rather erratic movement (which may in part be due to the inadequate coverage of statistics), the most interesting trend being the gradual re-emergence of machinery exports on a small but nevertheless significant scale.

More Recent Trends in Trade

The foregoing analysis has shown that, although exports in the first quarter of 1949 continued at about the same level as in the preceding quarter and remained high in relation to the first quarter of 1948, difficulties had begun to arise in certain markets, especially the United States, and in certain exporting countries, especially Switzerland and Italy. Available trade returns for April and May, although too incomplete for conclusive analysis, indicate that in the second quarter of the year these difficulties were intensified. The total value of exports of the ten countries listed in Table XVI fell in April by about 3 per cent from the rate for the first quarter, although returns for May for a smaller sample of countries were slightly more favourable. Hitherto during the post-war transition period, seasonal factors have helped to produce a strong rise in exports from the first to the second quarter—about 16 per cent in volume in 1947 and 14 per cent in 1948. The apparent absence of a

significant upturn so far during the current year, if confirmed when fuller data for the second quarter are available, would therefore be tantamount to a decline in exports after adjustment for seasonal influences.

In contrast to these tendencies, an analysis of the trade agreements concluded among European countries for the year 1949 shows that a very big increase has been planned for the immediate future, as described in a separate note.¹ It appears likely that the actual development of intra-European trade may lag considerably behind the amounts envisaged under the trade agreements. These agreements are not, in most instances, to be considered as commitments to buy and sell, but rather as obligations to issue import and export licences, thus merely providing a basis for individual transactions. It may, therefore, be a natural development that the scope of trade agreements is enlarged in a period when many countries are encountering marketing difficulties for their exports while the demand for imports is slackening because of restocking and the decline in inflationary pressure, with the result that governments have little reason to fear that a more liberal provision for import licences will lead to a corresponding increase in imports.

¹ See "Note on European Trade Agreements for 1949" page 22.

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POPULATION CHANGES IN EUROPE, 1938-1947¹

The war produced major changes in the demographic situation of Europe, including vast migrations as well as direct war losses, the incidence of which varied considerably from one area to another. Information on these changes is incomplete, and for a number of countries even estimates of the total population are rather unreliable. In the present article, however, a systematic attempt is made to measure the wartime and post-war population changes in Europe excluding the U.S.S.R.

In order to analyse these changes in population, a scheme of individual balance sheets was set up for each country for each of two periods—the war years from the end of 1938 to the end of 1945, and the post-war transition years 1946 and 1947. These balance sheets, which are given in Table 1, were constructed on the principle that :

Pre-war population + births — deaths + changes due to increase of territory — changes due to decrease of territory + inward population shifts — outward population shifts = post-war population.

In all instances an attempt was made to estimate each component separately and in detail rather than to derive any of the items as a residual. Thus, in a number of cases, for the war years "normal" deaths were computed apart from war deaths, which in turn were built up from separate estimates of civilian losses and military losses. Civilians killed or presumed dead were taken to include those who died in air bombardments, land fighting, and massacres, as well as deaths among political deportees, deaths among workers recruited by the enemy, and Jews murdered by the Nazis. Military losses were estimated for those killed and missing on the field and deaths among prisoners of war. The distinction between these different groups is necessarily somewhat arbitrary and difficult to apply to a period of total war.² Moreover, for a number of countries, especially those which were most seriously

¹ The present article and the accompanying figures in Table 1 have been adapted from a detailed study being prepared by Mr. G. Frumkin, of the Research and Planning Division. Fuller explanation of the sources and methods underlying the figures and qualifications as to their relative accuracy will be given in that study.

² For instance, deaths among members of the "underground" movement may, for all practical purposes, be considered as military losses.

affected by the war, little information is available on these and other factors influencing the size of the population, and many of the estimates have therefore been made by indirect methods and must be considered as rough approximations.

The territory covered by the analysis includes all of the principal European countries outside the U.S.S.R. with the exception of Albania, Turkey, and Iceland.¹ The computations presented in Table 1 take account of changes in the political boundaries of European countries and do not, therefore, apply to a constant territory. Thus the loss in population resulting from a decrease in territory is entered as a negative item. Any reverse movements of population associated with the change in territory are entered separately as positive items in "net population shifts". In the final section of this article, the effects of population changes on the density of population are shown, however, within constant territorial areas.

Territorial Changes

The extensive changes in the post-war boundaries of European countries compared with pre-war² are indicated by the fact that the total population of the areas transferred from one country to another amounted, in 1938, to approximately 28 millions.³ The pre-war population of those Eastern European territories which were ceded to the Soviet Union during and after the war alone accounted for about 17.8 millions of this total and was made up as follows:

Area	Approximate pre-war population (millions)
Carpathian Ruthenia (from Czechoslovakia)	0.7
Part of East Prussia (from Germany)	1.2
Eastern provinces of Poland	11.6
Bessarabia (from Rumania)	3.2
Northern Bukovina (from Rumania)	0.7
Karelia (from Finland)	0.4
Total	17.8

¹ See note a to Table 1 for a fuller statement of the areas included in the estimates.

² See map in Figure 1 below.

³ Excluding the population (approximately 5.7 millions) of the pre-war Baltic States—Estonia, Latvia and Lithuania.

Table 1
EUROPE
POPULATION BALANCE SHEETS FOR
Thousand

ITEM	WESTERN BELLIGERENT COUNTRIES							GERMANY, AUSTRIA AND ITALY		
	Belgium	Denmark	France	Luxemburg	Netherlands	Norway c	United Kingdom	Austria d	Germany e	Italy f
	A. 1938-1945									
Population at end of 1938 within 1938 frontiers g	8,386	3,794	41,680	301	8,729	2,926	47,814	6,653	69,700	43,780
Population changes due to :										
1. Territorial changes	—	—	—	—	—	—	—	—	9,200	—
2. Births	812	559	4,145	30	1,377	375	5,380	830	7,900	6,570
3. Deaths (normal)	—736	—277	—4,665	—23	—614	—211	—4,026	—690	—6,200	—4,540
4. War losses	—88	—1.4	—600	—5	—210	—10.2	—388	—334	—4,200	—410
(a) Military	—12	—0.4	—250	—4	—12	—6.3	—326	—230	—3,500	—330
(b) Civilian	—76	—1.0	—350	—1	—198	—3.9	—62	—104	—700	—80
5. Population shifts (net)	—30	200	190	—19	—4	..	500	235	2,850	—100
(a) Prisoners of war outstanding i	—	—	..	—	—	—	—	—120	—4,400	—300
(b) Other, including displaced persons	—30	200	190	—19	—4	..	500	355	7,250	200
Population at end of 1945 within 1945 frontiers (excluding prisoners of war)	8,344	4,275	40,750	284	9,278	3,080	49,280	6,694	60,850	45,300
Less displaced persons	—	—	—	—	—	—	—	—200k	—1,250k	—100
Plus prisoners of war outstanding i	—	—	—	—	—	—	—	120	4,400	300
Population adjusted for transitory elements; i.e., including prisoners of war outstanding and excluding displaced persons	8,344	4,275	40,750	284	9,278	3,080	49,280	6,614	64,000	45,500
	B. 1945-1947									
Population at end of 1945 within 1945 frontiers	8,344	4,275	40,750	284	9,278	3,080	49,280	6,694	60,850	45,300
Population changes due to :										
1. Territorial changes	—	—	—	—	—	—	—	—	—	—1,000
2. Births	299	191	1,699	10	552	138	1,980	240	1,800	2,020
3. Deaths	—224	—85	—1,076	—8	—158	—58	—1,194	—182	—1,500	—1,060
4. Population shifts (net)	92	—142	232	3	42	..	—413	277	6,450	350
(a) Prisoners of war returned i	—	—	—	—	—	—	—	60	2,800	300
(b) Other, including reduction in number of displaced persons	92	—142	232	3	42	..	—413	217	3,650	50
Population at end of 1947 within 1947 frontiers (excluding prisoners of war)	8,511	4,239	41,605	289	9,714	3,160	49,653	7,029	67,600	45,610
Less displaced persons	—	—	—	—	—	—	—	—167k	—600k	—100
Plus prisoners of war outstanding i	—	—	—	—	—	—	—	60	1,600	—
Population adjusted for transitory elements; i.e., including prisoners of war and excluding displaced persons	8,511	4,239	41,605	289	9,714	3,160	49,653	6,922	68,600	45,510

a Countries or areas not included in the present estimates are : the U.S.S.R. (including pre-war Baltic States), Albania, Turkey, Iceland, Andorra, Faroe Islands, Dodecanese Islands, Liechtenstein, Monaco, San Marino, Vatican City, Channel Islands, Gibraltar, Isle of Man, Malta and Gozo. Excluding the U.S.S.R. (as well as the pre-war Baltic States) and the non-European portion of Turkey, the population of these countries and areas omitted from the figures was approximately 1.8 million at the end of 1938 and 2 millions at the end of 1947.

As noted in the text, many of the figures employed in the present estimates are necessarily subject to a considerable margin of error, especially for those countries most seriously affected by the war.

b Because of rounding, the totals in the final column do not coincide with the sum of the figures for individual countries. In addition, rough estimates for the Free Territory of Trieste (1936 population about 345,000), formerly a part of Italy, are included in the totals for the period 1945-1947, but are not given separately. For the 1938-1945 period, the population of Trieste is included in the Italian data.

c Not including migrations.

d Initial population figures for Austria and Germany are for mid-May 1939. The estimates for births and deaths are likewise made as from that date.

1

EUROPEAN COUNTRIES, 1938-1947^a
sands

Bul-garia	Czecho-slovakia	Fin-land	Greece ^f	Hungary	Poland	Rumania	Yugo-slavia	OTHER COUNTRIES					TOTAL ^b
								Ireland	Portu-gal	Spain	Sweden	Switzer-land	
6,270	15,310	3,697	7,180	9,200	34,800	19,850	15,490	2,942	7,590	25,500	6,310	4,200	392,100
320	— 700	— h	—	—	— 3,600	— 4,180	—	—	—	—	—	—	— 17,350
1,050	2,070	547	1,160	1,270	3,200	2,860	2,600	432	1,367	3,903	801	536	49,800
— 630	— 1,495	— 343	— 840	— 950	— 3,000	— 2,270	— 1,400	— 300	— 855	— 2,786	— 491	— 345	— 37,700
— 20	— 365	— 84	— 160	— 420	— 4,300	— 460	— 1,700	—	—	—	—	—	— 13,750
— 10	— 150	— 82	— 20	— 140	— 100	— 200	— 300	—	—	—	—	—	— 5,650
— 10	— 215	— 2	— 140	— 280	— 4,200 ⁱ	— 260	— 1,400	—	—	—	—	—	— 8,100
— 50	— 1,060	— 2	..	10	— 3,200	— 250	— 350	— 100	— 34	— 96	94	55	— 1,200
— 50	— 1,060	— 2	..	180	— 3,200	— 150	— 350	— 100	— 34	— 96	94	55	— 5,100
6,940	13,760	3,815	7,340	9,110	23,900	15,550	14,640	2,974	8,068	26,521	6,714	4,446	371,900
—	—	—	—	—	—	—	—	—	—	—	—	—	— 1,550
—	—	—	—	170	—	100	—	—	—	—	—	—	5,100
6,940	13,760	3,815	7,340	9,280	23,900	15,650	14,640	2,974	8,068	26,521	6,714	4,446	375,450
6,940	13,760	3,815	7,340	9,110	23,900	15,550	14,640	2,974	8,068	26,521	6,714	4,446	371,900
—	—	—	—	—	—	—	700	—	—	—	—	—	—
350	586	213	450	342	1,200	760	900	137	406	1,160	260	177	15,900
— 190	— 328	— 91	— 200	— 249	— 600	— 640	— 450	— 86	— 231	— 673	— 144	— 102	— 9,500
..	— 1,755	— 2	..	— 15	— 800	80	— 90	— 13	— 7	..	31	77	4,350
—	—	—	—	140	—	80	—	—	—	—	—	—	3,400
..	— 1,755	— 2	..	— 155	— 800	..	— 90	— 13	— 7	..	31	77	950
7,100	12,263	3,935	7,590	9,188	23,700	15,750	15,700	3,012	8,236	27,008	6,861	4,598	382,650
—	—	—	—	—	—	—	—	—	—	—	—	—	— 850
—	—	—	—	30	—	20	—	—	—	—	—	—	1,700
7,100	12,263	3,935	7,590	9,218	23,700	15,770	15,700	3,012	8,236	27,008	6,861	4,598	383,500

e Including Danzig pre-war.

f Excluding Dodecanese Islands (population about 115,000) formerly held by Italy (but not included in the estimates for Italy) and officially incorporated with Greece in October 1947.

g 1937 frontiers are used for Germany, Austria and Czechoslovakia.

h The population of Karelia (420,000) was evacuated to Finland before cession to the U.S.S.R.

i Prisoners of war appear only as negative entries in the balance sheet of country of origin until repatriated. They are not entered in the country where temporarily held, whether inside or outside of Europe.

j Germans from Czechoslovakia taken prisoner when in the German army are included in the figure for prisoners of war outstanding for Germany.

k The figure for Austria represents displaced persons of non-German stock, thus excluding Reichsdeutsche and Volksdeutsche refugees. The figure for displaced persons in Germany consists mainly of those of non-German stock.

l Civilian losses among Poles and Jews in the Eastern provinces amounted to an additional 1,500 thousand.

The pre-war populations of the other principal territories in Europe which have been transferred since 1938 were as follows :

Area	Approximate pre-war population (millions)
" New " Provinces, including Danzig, (acquired by Poland)	8.9
Southern Dobrudja (acquired from Rumania by Bulgaria)	0.4
Venezia Giulia (acquired from Italy by Yugoslavia)	0.7
Free Territory of Trieste (formerly Italian)	0.3
Total	10.3

The figures of pre-war populations overstate, however, the extent of population transfers involved in these territorial changes, since in several instances there has been a substantial exodus from the ceded territory to the mother-country. For instance, the entire population of Karelia was evacuated to Finland before Karelia was transferred to the Soviet Union. In the case of Poland, the Polish and Jewish populations of the Eastern provinces ceded to the Soviet Union¹ were entitled, under the repatriation agreement between the Polish and Soviet Governments, to leave the ceded territories for Poland. Most of the Germans in the new territories which Poland acquired in the West were transferred to Germany. It is difficult to

¹ These populations in the area numbered about 5.2 millions in 1938, but 1.5 million are estimated to have been killed during the war.

estimate the exact number of people involved in these major migrations as well as in the smaller population movements connected with other territorial changes, but these movements were one of the principal factors in the wartime and post-war population shifts discussed below.¹

Deaths and Births

War losses in Europe, outside the U.S.S.R.,² during the years from 1939 to 1945 amounted to over 15 millions,³ compared with "normal" deaths of 38 millions. The toll of the war and the genocide which accompanied it is shown in Table 2, which gives military and civilian war losses for the Western belligerent countries, the major Axis Powers, and the Eastern and South-Eastern European belligerent countries.

The greater part of the war losses were among civilians, who accounted for over 9 million deaths against 6 million deaths among the armed forces.

¹ The population of Karelia, however, is not included in the data on territorial changes and population shifts in Table 1, since, as stated above, the inhabitants of the area were moved to Finland before the territory was transferred.

² With regard to war losses of the Soviet Union, the following information was published in *Soviet News* of 15 March 1946, issued by the Press Department of the Soviet Embassy in London : "As a result of the German invasion the Soviet Union has lost irretrievably in the fighting against the Germans, and also through the German occupation and the deportation of Soviet citizens to German servitude, a total of about seven million people."

³ Including Poles and Jews killed in the Eastern provinces of Poland.

Table 2
MILITARY AND CIVILIAN WAR LOSSES, 1939-1945
Thousands

Area	Military losses	Civilian losses		Total
		Jews murdered	Other civilian deaths	
1. Western belligerents	610	230	460	1,300
2. Germany, Austria and Italy	4,060	250	605	4,915
3. Eastern and South-Eastern belligerents ^a	1,000	4,060	3,950	9,010
Total	5,670	4,540	5,015	15,225

^a Including civilian losses of 1,500 thousands among Poles and Jews in the Eastern provinces of Poland ceded to the Soviet Union, not included in the balance sheet.

Civilian losses were overwhelmingly concentrated in those areas occupied by the Germans, and the number of Jews killed (including 250,000 in the Axis countries proper) made up almost one-half of total civilian losses. Losses among the civilian population were particularly heavy in Poland, the first country hit by the war and the country to which the Nazis applied their principles of genocide most systematically. In Poland, deaths due to direct warfare amounted to some 100,000. Other losses amounted to 5.7 millions,¹ of which 3.4 millions were Jews killed inside and outside concentration camps, 1.3 million were other deaths in prisons and camps and 1 million were other deaths outside camps.

In the case of German prisoners of war, the figure of 890,000 reported by the Soviet authorities in March 1947 was much below German expectations. It may be assumed that a large number of soldiers reported as missing and presumed captured were in fact dead.

Births reached nearly 50 millions during the war years, so that, with "normal" deaths of 38 millions, there was an excess of births over deaths of 12 millions. Table 3 shows the geographical distribution of the excess of births over normal deaths from the end of 1938 to the end of 1945.

Table 3

EXCESS OF BIRTHS OVER NORMAL DEATHS, 1939-1945

Millions

Area	Births	Normal deaths	Excess of births over normal deaths
1. Western belligerents . . .	12.8	10.6	2.2
2. Germany, Austria and Italy	15.3	11.4	3.9
3. Eastern and South-Eastern belligerents	14.7	10.9	3.8
4. Other countries	7.0	4.8	2.2
Total	49.8	37.7	12.1

From the point of view of Europe as a whole, the war losses of 15 millions sustained from 1939 to the end

of 1945 were, to a large extent, offset by the 12 millions excess of births over normal deaths, the final deficit being 3 millions for Europe as a whole, although the situations of the various countries differed greatly.

As might have been expected, the years 1946-1947 show a further rise in births accompanied by a decrease in the number of deaths. There were, in fact, nearly 16 million births compared with 9.5 million deaths—an excess of births over deaths of 6.5 millions. Table 4 shows the excess of births over deaths for several countries of Western Europe in the years 1946-1947 compared with the pre-war years 1937-1938.

Table 4

EXCESS OF BIRTHS OVER DEATHS,
SELECTED COUNTRIES, 1937-1938 AND 1946-1947

Thousands

Country	1937 - 1938	1946 - 1947
France	-47	623
Italy	796	960
United Kingdom	302	786
Belgium	41	75
Netherlands	199	394
Finland	54	122

The remarkable excess of births over deaths in the years 1946-1947 went a long way towards compensating (numerically but not by age groups), for war losses and such reduction in births as occurred during the war. Thus, in Belgium and France, the excess of births over deaths during 1946-1947 was roughly equal to direct war losses, while in Italy and the Netherlands the excess of births over deaths in a single post-war year was more than sufficient to offset total war losses.

On the other hand, the heavy war losses of countries such as Poland and Yugoslavia cannot be compensated within a few years. The same is true of Germany, although in this case the influx of Germans expelled from neighbouring countries greatly exceeded its total war losses and resulted in a substantial net increase in population.

¹ Including Poles and Jews killed in the Eastern provinces of Poland.

Population Shifts

For Europe as a whole, excluding the U.S.S.R., the balance-sheet in Table 1 shows a net outward movement of population during the war and a net inward movement after the war, the preponderant item in both cases being prisoners of war. These movements result partly from the fact that prisoners of war are subtracted from the balance sheets when imprisoned, and are added when repatriated, without any compensating item in the captor country even if they were, in fact, held within the boundaries of Europe as defined in the estimates. In fact, the larger number were held outside the territory covered by the present study, mostly in the Soviet Union but also in the Near East, Far East, and other areas outside Europe.

The distribution by groups of countries of the net balance of population shifts is shown in Table 5.

During both the war years and the transition years, the most striking movement of population was that from East to West, much of which was accounted for by the expulsion of Germans from Eastern Europe. The influx of *Volksdeutsche* and other refugees into Germany and Austria was indeed so great that by the end of 1945 it offset by 1.6 million the outflow of prisoners of war. In addition, the so-called "displaced persons"¹ came largely from the Eastern countries and accounted for a substantial part of the net outward movement from that area.

The net balances of population shifts tend, however, to conceal the vast migrations of millions back and

forth across Europe in the chaotic period under review. Thus for Poland, some 5.4 million Germans had left by the beginning of 1946, in addition to the large number of displaced persons, of whom 400,000 moved into Germany and Austria, and 300,000 Soviet nationals who migrated to the Soviet Union under the repatriation agreement between that country and Poland. This exodus, however, was partly offset by the inflow of Poles and Jews who were allowed to leave the Eastern provinces ceded to the Soviet Union. During 1946 and 1947, population transfers continued with an inflow of some 800,000 persons repatriated from the Soviet Union and 700,000 repatriates and ordinary immigrants from other countries (including repatriates who had been residing outside Poland in 1938); there was also a further outflow of 200,000 Soviet nationals who were repatriated to the Soviet Union and of 2.1 million Germans who were evacuated from Poland by the end of 1947.

In the case of Germany as in that of Poland, it is impossible to measure (except as estimates of the net results) the waves of migration of millions of people back and forth across the national boundaries since 1939. In addition to the movements of forced labour and other non-German displaced persons, there was, during the war, a major repatriation movement of German minorities from the former Baltic countries, the Soviet Union, and other Eastern European countries. At the same time, a movement took place in the opposite direction when German settlers were sent to the Polish provinces annexed by Germany. Toward the end of the war and up to the end of

¹ See footnote *k* to Table 1.

Table 5
NET POPULATION SHIFTS, 1939-1947
Thousands

Area	1939 - 1945			1946 - 1947		
	Prisoners of war outstanding	Other	Total	Prisoners of war returned	Other	Total
1. Western belligerents	—	837	837	—	-186	-186
2. Germany, Austria and Italy	-4,820	7,785 ^a	2,965	3,160	3,917 ^b	7,077
3. Eastern and South-Eastern belligerents	-270	-4,632	-4,902	220	-2,802	-2,582
4. Other countries	—	-81	-81	—	86	86
Total ^c	-5,100	3,900	-1,200	3,400	950	4,350

^a Including 1,550 thousand displaced persons remaining at the end of 1945.

^b Including the reduction in the number of displaced persons by 700 thousand by the end of 1947.

^c Rounded as in Table 1 (see footnote *b*, Table 1).

1945, there was again a mass influx into Germany of some 4.7 million Germans from the new territories acquired by Poland, 700,000 from central Poland, 600,000 from Czechoslovakia and a substantial inflow of refugees from Soviet East Prussia. In 1946 and 1947, the migration into Germany continued with the transfer of a further 1.8 million Germans from Czechoslovakia, 2.1 millions from Poland and 200,000 from Hungary and Rumania, as well as the return of more than 200,000 refugees who were in Denmark at the end of 1945.

In France there were also major shifts in population beginning in 1939 : some 100,000 refugees from the Nazis and 400,000 Spanish refugees (most of whom drifted back to Spain) entered France in 1939, and about 25,000 Poles entered in 1940, while roughly half-a-million Germans emigrated to France during the war. There was, on the other hand, a tremendous outward movement: 100,000 French fled abroad; 1.8 million became prisoners of war; and some 600,000 French workers were sent to Germany. In 1946-1947, there was an outflow of about 50,000 repatriated Poles and a total inflow of almost 300,000 immigrants, including North Africans, clandestine emigrants from Italy, other foreign workers and their families, and German prisoners of war who elected to remain in France as free workers.

The United Kingdom was least affected by the ebb and flow of migrants across the continent. The net inflow of population to the United Kingdom during

the war was approximately 500,000, including many emigrants from Ireland and demobilized members of the Polish forces. This wartime movement was largely offset by a net outflow of some 400,000 in 1946 and 1947.

Total Population and Population Densities

As a result of all the factors that have so far been discussed, the total population of Europe, outside the U.S.S.R., fell from 392.1 millions at the end of 1938 to 383.8 millions at the end of 1947, including unreturned prisoners of war and excluding displaced persons. The geographical distribution of the total population at the end of 1938, 1945 and 1947 as well as the changes in population during these years is shown in Table 6.

Between 1938 and 1945 the population within the changing political boundaries of Europe west of the U.S.S.R. (including persons who were still held as prisoners of war at the end of the period) declined by approximately 16.5 millions, or by some 15 millions if displaced persons are included. In the Western belligerent countries and the neutral countries (as well as Italy) there was a net increase in population during the war years, but this was far outweighed by the decrease in the population of Central and Eastern European countries. Since the short-fall in births compared with deaths (including war losses) for Europe as a whole during those years was some

Table 6
POPULATION AND CHANGES IN POPULATION, END 1938 TO END 1947,
INCLUDING UNRETURNED PRISONERS OF WAR IN COUNTRY OF ORIGIN

Millions

Area	Population (End of year)			Changes in population	
	1938	1945	1947	1938 - 1945	1945 - 1947
1. Western belligerents	113.6	115.3	117.3	+ 1.7	+ 2.0
2. Germany, Austria and Italy	120.2	116.1	121.0	- 4.1	+ 4.8
3. Eastern and South-Eastern belligerents	111.8	95.4	95.3	- 16.4	- 0.1
4. Other countries	46.5	48.7	49.8	+ 2.2	+ 1.0
Total	392.1	375.5	383.5 ^a	- 16.3	+ 8.0 ^a

^a Rounded as in Table 1 (see footnote ^b, Table 1).

Figure 1

CHANGES IN DENSITY OF POPULATION IN EUROPE
FROM 1937 TO 1947 WITHIN 1947 NATIONAL BOUNDARIES



3 millions,¹ the chief factor in the decline was the loss of population through frontier changes in the East, after allowance for repatriations from the ceded territories.

Between 1945 and 1947 the population of all areas rose, except in the group of Eastern and South-Eastern countries, where total population declined

slightly as a result chiefly of further population transfers out of Czechoslovakia and Poland. The increase of 8 millions during these two years in the total population of the European countries covered by the analysis, in which the substantial excess of births over deaths was the principal element, amounted to almost one-half of the decline in European population during the war years.

¹ Including war losses among the Polish and Jewish population of the Eastern provinces ceded to the Soviet Union.

Table 7

PRE-WAR AND POST-WAR POPULATION, AREA AND DENSITY OF POPULATION
IN EUROPE WITHIN 1947 NATIONAL BOUNDARIES ^a

Country	Area within 1947 boundaries <i>(Thousands of square kilometres)</i>	Population of the area <i>(Millions)</i>		Density of population <i>(Number of persons per square kilometre)</i>	
		End of 1938	End of 1947 ^b	End of 1938	End of 1947 ^b
Belgium	31	8.4	8.5	271	274
Denmark	43	3.8	4.2	88	98
France	551	41.7	41.6	76	75
Luxemburg	2.6	0.30	0.29	115	112
Netherlands	41	8.7	9.7	212	236
Norway	387	2.9	3.2	7	8
United Kingdom	245	47.8	49.6	195	203
Austria	84	6.7	6.9	80	82
Germany	378	59.6	68.6	158	182
Italy	303	42.8	45.5	143	150
Bulgaria	111	6.6	7.1	59	64
Czechoslovakia	128	14.6	12.3	114	96
Finland	337	3.3	3.9	10	11
Greece	130	7.2	7.6	55	58
Hungary	93	9.2	9.2	99	99
Poland	310	32.3	23.7	104	76
Rumania	237	15.7	15.8	66	67
Yugoslavia	255	16.1	15.7	63	62
Ireland	69	2.9	3.0	42	43
Portugal	92	7.6	8.2	83	89
Spain	503	25.5	27.0	51	54
Sweden	449	6.3	6.9	14	15
Switzerland	41	4.2	4.6	102	112
Total ^a	4,822	374.2	383.5	78	80

^a Excluding countries and areas specified in note ^a of Table 1, but including Trieste in the total.^b Including unreturned prisoners of war and excluding displaced persons of non-German stock.

Although the population of the European countries included in the estimates in Tables 1 and 6 was somewhat smaller at the end of 1947 than it was immediately before the war, territorial transfers and the large shifts in population during and since the war have resulted in a general increase in the density of population in Europe and in wide divergences in the relative position of different countries. Because of such unequal factors as climate, natural resources and the state of economic development of different areas (which would invalidate direct comparisons of population densities

between countries or for the same country at different periods when its boundaries have shifted) it is necessary to examine changes in population density within constant boundaries rather than within shifting political frontiers. In Table 7 and Figure 1, data are given on the area of each country within its post-war boundaries and on the pre-war and post-war populations in that area (including unreturned prisoners of war but excluding displaced persons), and on the corresponding population densities derived from these data. The average density for all of Europe (outside the

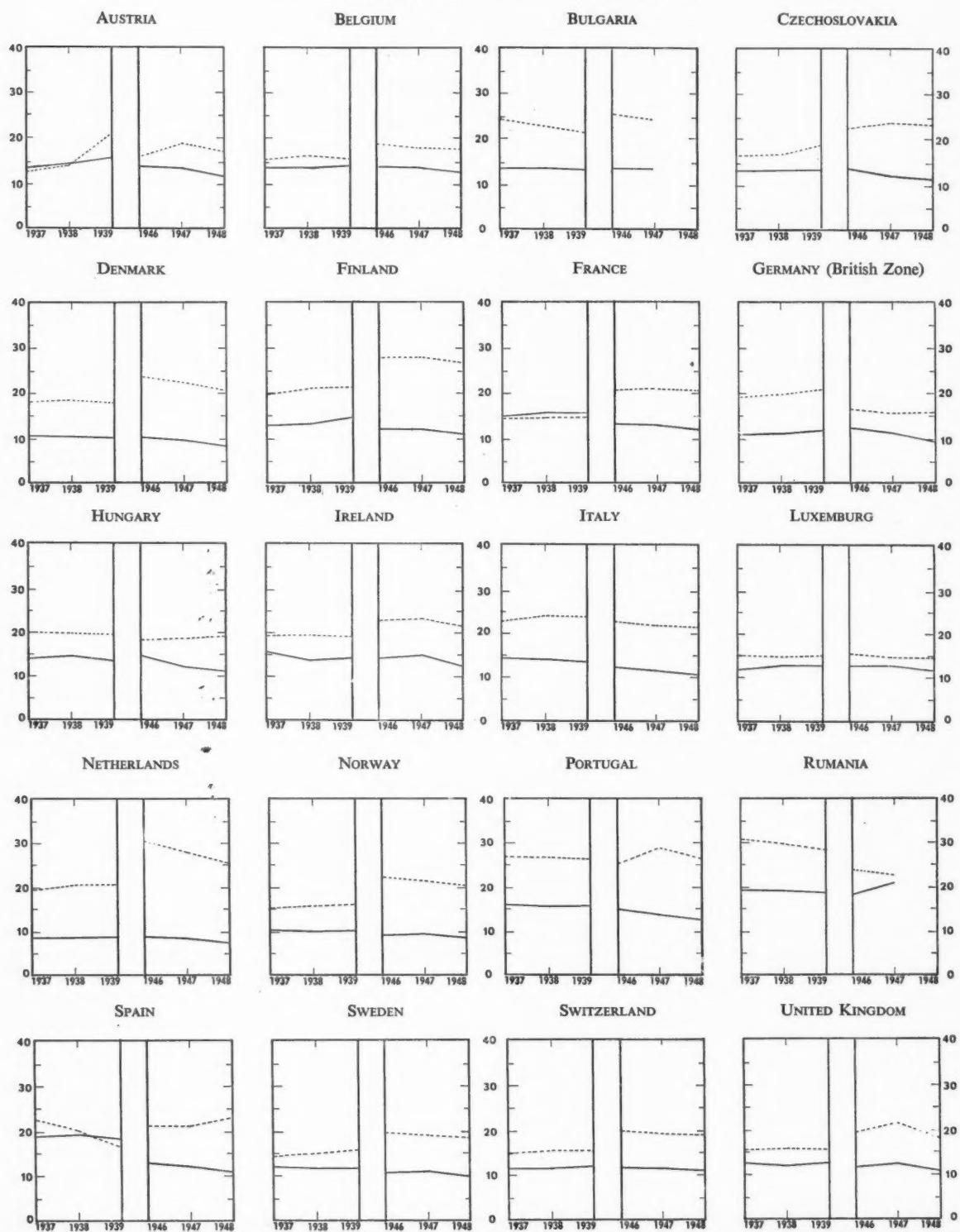
Figure 2

CRUDE BIRTH AND DEATH RATES OF EUROPEAN COUNTRIES BEFORE AND AFTER THE WAR

Number of births and deaths per 1,000 inhabitants, excluding stillbirths

..... Crude birth rate

— Crude death rate



Source : *Monthly Bulletin of Statistics*, United Nations.

U.S.S.R.) within its present boundaries was moderately, but still significantly, higher at the end of 1947 than before the war, increasing from 78 to 80 inhabitants per square kilometre. However, this average conceals enormous variations between different national areas. The most extreme changes have been in those areas whose populations were subject to the heaviest war losses and to the most extensive migration movements. The combined effect of these two influences resulted in a fall of more than one-quarter in the density of population in the area now comprised within the territorial limits of Poland. The population density of Czechoslovakia within its present boundaries has also declined considerably—by some 15 per cent—the predominant factor being the expulsion of the German minorities after the war. On the other hand, in Germany, despite extremely heavy war losses, the influx of German refugees from other Central and Eastern European areas has resulted in an increase of about 15 per cent in the density of population within the country's post-war frontiers.¹ Generally speaking, in most other European countries, with France, Yugoslavia and Hungary as the major exceptions, the density of population has increased by smaller but nevertheless by significant amounts, the rise being relatively greatest—around 10 per cent—in the Netherlands, Denmark and Switzerland.

The changes which have occurred in the relative densities of population are of major economic significance, notably, for instance, with regard to housing needs and requirements and the availability of food-stuffs. It appears, moreover, from the wartime and post-war level of births and deaths in Europe that, despite war losses in persons among the reproductive age groups, there is a new trend in population development which may cause the total population of Europe to rise considerably more than could be foreseen earlier on the basis of pre-war trends. Figure 2 gives data for a number of European countries and shows the extent to which birth rates exceeded death

rates during the past three years compared with their immediate pre-war relationship. It is too early, however, to draw definite conclusions from such a short period of time. As after the first World War, the relatively high post-war birth rate is undoubtedly due in large part to temporary factors and has already begun to recede in some cases, although the experience of the last fifteen years suggests that the long-term declining tendency has at least been arrested. The fall in death rates, an even more widespread phenomenon than the post-war rise in birth rates, must also be viewed in its long-term perspective. However, the extent of the decline which has occurred during this early transition period appears to be a strong intensification of pre-war trends.

Beyond these recent and prospective changes in the over-all density of population of European countries, the structure of population has, in many instances, undergone modifications of considerable economic and social significance. In most European countries, the size of the younger age groups has increased in relation to that of the working population which must support them. This has been especially marked in the Eastern European countries, where the number of adults in the productive age groups was seriously depleted as the result of war losses. In Western European countries, where war losses were less severe, the ratio of dependent to productive age groups has changed in a similar direction as a result of the rise in birth rates and the fall in death rates in recent years.

The occupational distribution of the populations in European countries has also been affected by such factors as the movement of the Sudeten Germans out of Czechoslovakia into Germany and, in the case of Poland, by the mass murder of the Jewish population, reducing the classes formerly engaged in handicrafts and commerce and by the reduction in rural population through the transfer of territory to the U.S.S.R. A detailed quantitative analysis of the changes in European man-power and its occupational distribution cannot be made until new national censuses are taken and the results analysed, which may not be until some years hence, though in the meantime further study of the factors which have been responsible for these population changes may give a broad indication of their significance for the European economy.

¹ The increase in density appears to have been most marked in the Bizonal area, where, by mid-1948, the increase in population over 1939 probably amounted to some 20 per cent. In the Soviet Zone the increase is estimated as roughly similar to that indicated for the whole of Germany. The increase in the French Zone appears to have been small, if any, compared with 1939, and the population of Berlin was still considerably smaller than before the war.

NOTE ON EUROPEAN TRADE AGREEMENTS FOR 1949

Since the war, almost the whole of intra-European trade has been conducted under bilateral trade agreements concluded between European countries, which extend to relations between almost every pair of trading partners in the area. For the most part, these agreements are permissive rather than contractual in character and contain merely a mutual undertaking to issue export and import licences for commodities in the quantities laid down. Up to the present, quantitative restrictions on imports and exports appear to have been an effective limiting factor on the volume of trade. It can therefore be said that trade agreements, which lay down the scale and nature of these limits, have had a governing influence on the actual course of trade.

In 1949 this may no longer be true to the same extent since, as the following analysis shows, the volume of trade fixed in the new trade agreements allows for a far more substantial increase in intra-European trade than could be expected to occur in the light of current trends. Nevertheless, an analysis of existing trade agreements should provide an indication of the probable changes in the pattern of intra-European trade that are likely to take place in the current year.

The following analysis is based on the examination of about 120 trade agreements. These agreements cover trade relationships which (excluding Germany) correspond to just over one-half of total intra-European trade in 1948—70 per cent of trade between Eastern European countries, 55 per cent of East-West trade and 47 per cent of trade between Western European countries. In cases where trade agreements have been concluded for periods of less or more than twelve months, proportionate estimates have been made of the annual rate of trade for 1949. Agreements which expired before 30 June 1949 or after 30 June 1950 have not been included. The results of this analysis are summarized in the following table, where the values of trade foreseen for 1949 under the agreements are compared with actual trade in 1948. Since the method of calculation may involve a certain margin of error, the resulting figures relating to

the agreements for 1949 should be regarded as estimates.

The main result shown by the analysis of this sample is that the current trade agreements provide for a very much higher level of intra-European trade than that which actually took place in 1948. The difference is largest in East-West trade where the total turnover foreseen in the agreements is more than 100 per cent higher than the actual trade in 1948 (or 97 per cent higher excluding Germany). In trade between Western European countries the agreements provide for an increase of about 41 per cent, and in trade among Eastern European countries for an increase of 42 per cent. In East-West trade, where the increase is greatest, the agreements analysed provide for a much higher percentage rise of Western European exports to Eastern Europe than of Eastern European exports to Western Europe. This may reflect the intention of Western European countries to achieve a more closely balanced level of trade with Eastern Europe in 1949 than that which occurred in 1948.

Similarly, in the case of trade with Western Germany in which the coverage of the agreements analysed is nearly complete, it appears that the lack of balance in trade with Western Europe which prevailed in the last year will tend to be counteracted by the new agreements. The proposed increase in imports into Germany from Western Europe is substantially larger than the proposed increase in exports by Germany to that area, and as a result Germany's export surplus, which amounted to \$130 million in 1948, should tend to disappear if the agreements are fulfilled.

Although the sample of agreements analysed, as mentioned above, covers trade relationships which accounted for only about one-half of total intra-European trade in 1948, the general results relating to the level of trade in the various areas of Europe may be regarded as an indication of the current trend of trade agreements. It is known that a number of agreements which could not be analysed in detail provide for increases of the same order as those included in the sample, while others are being

COMPARISON OF TRADE AGREEMENTS FOR 1949 WITH ACTUAL TRADE IN 1948,
FOR A SAMPLE OF INTRA-EUROPEAN TRADE ^a

Millions of dollars in current prices

Exporting Area	Importing Area	WESTERN EUROPEAN COUNTRIES		EASTERN EUROPEAN COUNTRIES		TOTAL EUROPE	
		Excluding trade with Germany	Including trade with Germany	Excluding trade with Germany	Including trade with Germany	Excluding trade with Germany	Including trade with Germany
Western European countries :							
1948 Actual		3,340	4,411	393	431	3,733	4,842
1949 Agreements		4,417	6,210	905	1,055	5,322	7,265
Percentage increase		32	41	130	145	43	50
Eastern European countries :							
1948 Actual		560	622	775	775	1,335	1,397
1949 Agreements		974	1,129	1,104	1,104	2,078	2,233
Percentage increase		74	82	42	42	56	60
Total Europe :							
1948 Actual		3,900	5,033	1,168	1,206	5,068	6,239
1949 Agreements		5,391	7,339	2,009	2,159	7,400	9,498
Percentage increase		38	46	72	79	46	52

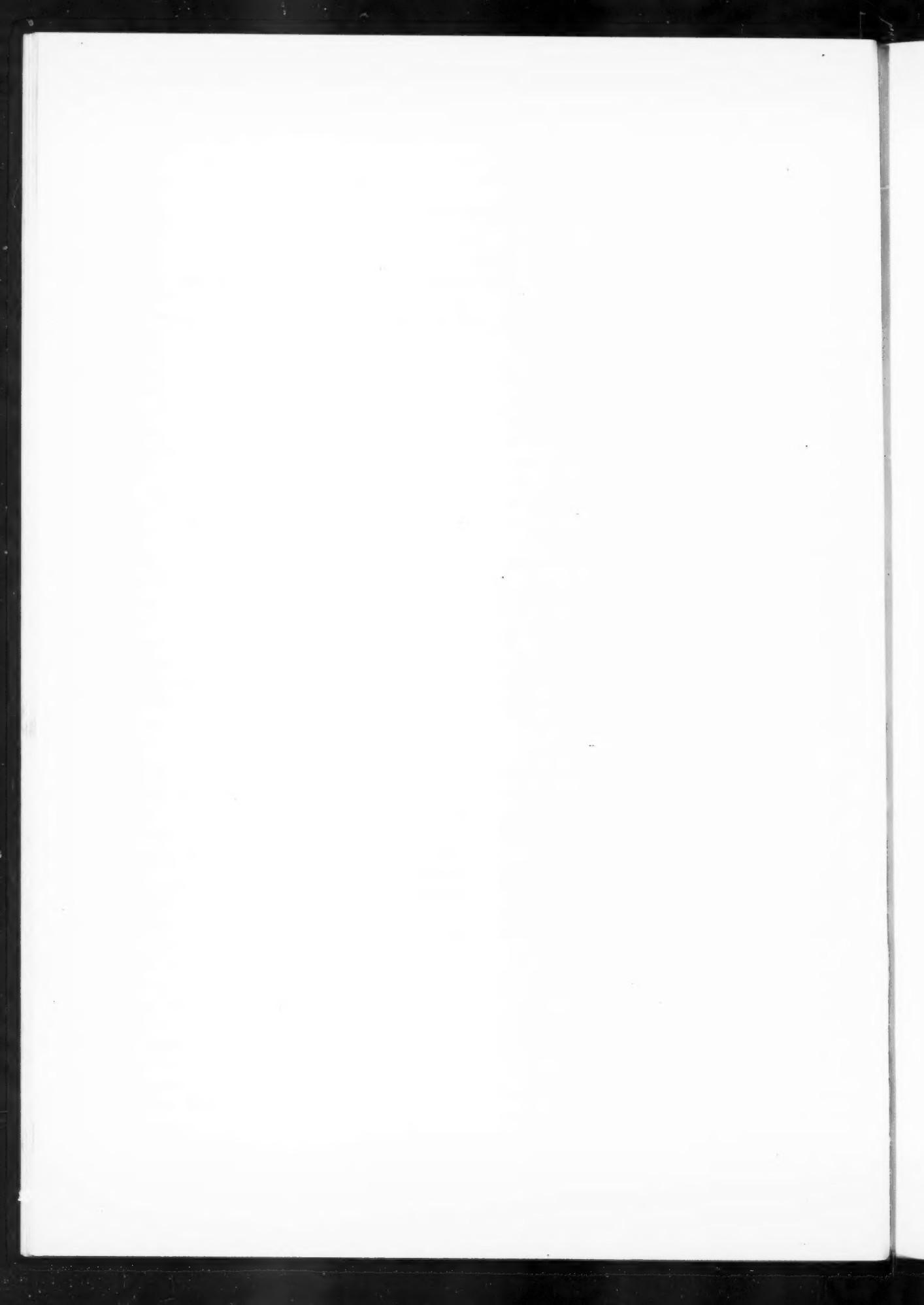
Note : The composition of the regional groups shown is as follows : "Western European countries" includes Austria, Belgium-Luxemburg, Denmark, Finland, France, Germany, Greece, Iceland, Ireland, Italy, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, Turkey, United Kingdom; "Eastern European countries" includes Bulgaria, Czechoslovakia, Hungary, Poland, Rumania, U.S.S.R. and Yugoslavia.

a Only trade between pairs of countries which have concluded agreements for 1949, of which the details are known, is included in the figures for each year. The sample covers 55 per cent of total intra-European trade in 1948 if Germany is included, or 51 per cent if Germany is excluded.

re-negotiated at present at considerably increased levels of trade. It appears to be generally true, therefore, that the trade agreements now in force or in the process of negotiation are expansive in character and provide for substantially increased volumes of trade.

However, since the actual development of trade in the first months of the year has not shown nearly the same rate of expansion as that provided for in the agreements, it seems probable that the newly con-

cluded agreements may not be fulfilled at the same high rate that prevailed in the past. The analysis, therefore, suggests the conclusion that, as a result of the substantial expansion of trade agreements, quantitative limitations may become progressively less effective in governing the general level of intra-European trade, although they may continue to exert a determining influence on the regional pattern of that trade.



EUROPEAN ECONOMIC STATISTICS¹

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SYMBOLS EMPLOYED

The following symbols have been used throughout this BULLETIN :

- .. = not available
- = nil or negligible
- * = estimate, by the Secretariat of the Economic Commission for Europe

In referring to combinations of years, the use of an oblique stroke—e.g., 1947/48—signifies a 12-month period (say from 1 July 1947 to 30 June 1948). The use of a hyphen—e.g., 1947-1948—signifies the full period of calendar years covered (including the end years indicated) either as an average or total, as specified.

Unless the contrary is stated, the standard unit of weight used throughout is the metric ton.

¹ For notes on the sources and methods used in the compilation of the statistics see pages 44 to 48.

Table I
THE LEVEL OF INDUSTRIAL PRODUCTION
Index numbers based on 1938 and 1947

Country	Average 1938=100	Average 1947 = 100								
	1947	1948				1949	1949			
	Average	Fourth quarter	First quarter	Second quarter	Third quarter	Fourth quarter	First quarter	January	February	March
Austria	51 ^a	112	134	155	161	177	170	164	165	180
Belgium	106	105	106	107	107	113	115	109	115	122
Bulgaria	145	114	94	111	129	134 *	..	..	..	..
Czechoslovakia .	87 ^a	109	112	120	111	126	123	120	125	124
Denmark	116	107	108	114	108	118	116	111	117	119
Finland	117	111	113	116	111	120	119	..	..	..
France ^b	95	101	116	122	110	120	131	126	134	135
Germany :										
Western zones ^b	34	108	121	126	162	188	211	212	212	210
Greece	70	108	100	101	108	128	117	116	115	121
Ireland	116	112	107	119	114	122	111	..	..	..
Italy	87	104	98	107	110	113	103	104	98	107
Netherlands . . .	95	113	111	118	115	129	128	129	129	128
Norway	108	105	109	117	96	112	120	115	124	120
Poland	104 ^c	114	124	130	125	137	138 *	..	..	..
Sweden ^d	138	100	102	103	103	105	106	105	106	105
United Kingdom ^e	108	110	112	112	106	117	121	116	123	123
Total of above countries :										
incl. Germany	84	107	112	116	114	125	129 *	125 *	130 *	131 *
excl. Germany	99	107	111	114	109	119	121 *	117 *	122 *	123 *
U.S.S.R. . . . .	..	130 ^f	132 ^f	124 ^f	123 ^f	129 ^f	123 ^f	..	..	..
U.S.A.	210	102	103	102	102	104	101	102	101	98

^a 1937=100.

^b Excluding the Saar.

^c Post-war production in post-war territory has been related to 1938 production in the pre-war area.

^d Adjusted for seasonal movements.

^e The annual index for 1947 (1938=100) has been obtained on the basis of 1946 weights. If 1935 weights were used, the index would be 116 (1938=100) and would raise the European total (including Germany) by two points.

^f Corresponding quarter previous year=100.

Table II
THE LEVEL OF PRODUCTION IN THE ENGINEERING INDUSTRIES
Index numbers based on 1938 and 1947

Country	<i>Average 1938 = 100</i>	<i>Average 1947 = 100</i>								
		1947	1948				1949	1949		
	Average	Fourth quarter	First quarter	Second quarter	Third quarter	Fourth quarter	First quarter	January	February	March
Austria	66 ^a	119	150	165	158	194	172	159	162	196
Belgium ^b	114	107	117	127	109	120	125	125	129	121
Czechoslovakia	97 ^a	112	115	134	116	131	135	129	138	138
Denmark	140	109	111	110	103	115	116	113	117	117
France ^c	98	97	115	123	117	131	141	135	143	144
Germany :										
Western zones ^c	23	119	130	135	184	236	268	261	264	280
Greece	19	123	134	122	155	175	155	149	162	154
Ireland	125	117	130	176	149	143	132	..	..	..
Italy	61	105	105	98	84	110	101	100	91	111
Netherlands	93	114	116	131	129	144	147	142	146	151
Norway	136	105	109	113	88	110	114	114	114	113
Poland	181 ^d	113	122	130	112	140	136 *	..	..	..
Sweden	143	101	104	104	101	106	106	105	106	106
United Kingdom	118	111	113	116	109	118	122	115	125	126 *
Total of above countries :										
incl. Germany	80	109	115	121	117	134	139 *	134 *	140 *	144 *
excl. Germany	106	108	114	119	110	124	127 *	122 *	129 *	131 *
U.S.A.	331	103	103	99	100	102	98	100	98	95

^a 1937 = 100.

^b Including a weight for Luxemburg.

^c Excluding the Saar.

^d Post-war production in post-war territory has been related to 1938 production in the pre-war area.

Table III
THE LEVEL OF PRODUCTION IN THE CHEMICAL INDUSTRIES
Index numbers based on 1938 and 1947

Country	<i>Average 1938 = 100</i>	<i>Average 1947 = 100</i>								
		1947		1948				1949		
	Average	Fourth quarter	First quarter	Second quarter	Third quarter	Fourth quarter	First quarter	January	February	March
Austria	66 ^a	124	145	165	187	212	221	213	215	233
Belgium	130 ^b	110	118	107	111	128	120	109	126	125
Bulgaria	138	116	..	..	..	..	..	..	..	..
Czechoslovakia .	102 ^a	110	118	120	117	132	129	123	130	134
Denmark	100	112	106	109	106	135	133	132	140	126
France ^c	110	98	118	126	109	110	119	112	121	124
Germany :										
Western zones ^c	30	105	123	134	168	186	204	198	193	220
Greece	59	104	99	93	87	147	122	123	121	121
Ireland	103	120	105	99	89	127	119	..	..	..
Italy	85	109	96	112	125	116	108	110	106	109
Netherlands . . .	83	117	120	129	125	131	136	133	138	136
Norway	98	99	88	106	109	102	128	129	127	127
Poland	147 ^d	114	134	146	146	160	174 *	..	..	..
United Kingdom	151	111	115	113	110	118	124	122	127	124
Total of above countries :										
incl. Germany	85	108	116	121	123	131	137 *	133 *	138 *	140 *
excl. Germany	116	109	116	120	116	124	128 *	123 *	130 *	129
U.S.A.	261	100	101	100	102	102	100	103	100	97

^a 1937 = 100.^b 1936-1938 = 100.^c Excluding the Saar.^d Post-war production in post-war territory has been related to 1938 production in the pre-war area.

Table IV
THE LEVEL OF PRODUCTION IN THE TEXTILE INDUSTRIES
Index numbers based on 1938 and 1947

Country	<i>Average 1938 = 100</i>	<i>Average 1947 = 100</i>								
		1947	1948				1949	1949		
	Average	Fourth quarter	First quarter	Second quarter	Third quarter	Fourth quarter	First quarter	January	February	March
Austria	36 ^a	136	150	151	166	193	210	193	199	238
Belgium	139	101	94	90	80	89	92	90	92	94
Bulgaria	121	106	..	..	..	..	..	..	..	..
Czechoslovakia .	60 ^a	114	128	131	114	140	135	128	138	139
Denmark	108	111	120	126	105	128	138	130	138	147
France ^b	89	108	115	122	101	118	118	113	119	123
Germany :										
Western zones ^b	27	108	129	140	198	226	264	247	253	293
Greece	90	101	92	91	101	112	103	101	101	107
Ireland	134	112	109	112	96	122	122	..	..	..
Italy	92	100	92	93	95	105	101	98	98	108
Netherlands . . .	87	113	119	121	112	133	134	128	136	137
Norway	108	107	116	124	94	117	129	124	132	131
Poland	97 ^c	119	124	126	130	138	143 *	..	..	..
Sweden ^d	129	101	106	107	103	110	110	109	110	112
United Kingdom	80	113	118	119	113	123	128	124	130	129
Total of above countries :										
incl. Germany	75	109	113	116	112	126	130 *	125 *	129 *	136 *
excl. Germany	86	109	112	114	105	118	120 *	116 *	121 *	124 *
U.S.A.	192	102	109	108	100	100	94	98	96	87

^a 1937 = 100.

^b Excluding the Saar.

^c Post-war production in post-war territory has been related to 1938 production in the pre-war area.

^d Including ready-made clothing.

Table V

PRODUCTION OF HARD COAL

*Monthly averages or calendar months**Millions of tons*

Country	1938	1947	1948				1949	1949		
	Average	Fourth quarter	First quarter	Second quarter	Third quarter	Fourth quarter	First quarter	January	February	March
Belgium	2.47	2.04	2.10	2.23	2.17	2.40	2.46	2.44	2.33	2.62
Czechoslovakia .	1.32	1.45	1.49	1.49	1.39	1.54	1.51	1.53	1.44	1.56
France	3.88	3.34	4.32	4.00	3.69	2.43	4.46	4.41	4.24	4.74
Saar	1.20	0.93	0.96	1.00	1.11	1.12	1.16	1.14	1.10	1.25
Germany	11.84 ^a	6.99	..	..	..	..	..	..	..	..
of which :										
U.K./U.S. Zone.	11.34	6.76	6.86	6.88	7.71	8.01	8.45	8.33	7.99	9.03
Soviet Zone . .	0.50	0.23	..	..	..	..	..	..	..	..
Italy	0.12	0.11	0.09	0.10	0.09	0.05	0.08	0.07	0.08	0.10
Netherlands . .	1.12	0.86	0.93	0.91	0.91	0.93	0.95	0.94	0.90	1.03
Poland	5.88 ^b	5.47	5.57	5.55	6.04	6.26	6.03	6.03	5.65	6.40
Spain	0.47	0.87	0.82	0.90	0.90	0.86	0.87	0.82	0.83	0.95
Turkey	0.22	0.32	0.33	0.34	0.34	0.34	0.35	0.36	0.33	0.35
United Kingdom	19.32	17.63	17.40	18.18	16.43	18.25	18.74	18.17	18.98	19.07
Other European countries	0.26 *	0.29 *	0.29 *	0.28 *	0.28 *	0.30 *	0.30 *	0.29 *	0.30 *	0.31 *
Total Europe (excl. U.S.S.R.)	48.10 *	40.30 *	41.39 *	42.09 *	41.30 *	42.73 *	45.60 *	44.77 *	44.41 *	47.66 *
Index numbers :										
1938 = 100 . .	100	84	86	88	86	89	95	93	92	99
1947 = 100 . .	126	105	108	110	108	112	119	117	116	125
U.S.A. ^c	29.84	54.32	46.12	47.44	50.79	49.84	40.80	46.73	43.78	31.90

^a Production in post-war boundaries, excluding the Saar.^c Including a small amount of lignite.^b Production in post-war boundaries.

Table VI
PRODUCTION OF ELECTRIC POWER

Monthly averages or calendar months

Millions of kilowatt hours

Country	1938	1947	1948				1949	1949		
	Average	Fourth quarter	First quarter	Second quarter	Third quarter	Fourth quarter	First quarter	January	February	March
Austria	250	323	345	411	466	364	317	321	293	336
Belgium	438	664	669	619	628	719	710	721	671	738
Czechoslovakia .	338	618	619	586	586	714	703	711	663	735
Denmark	95	156	154	126	141	172	156	167	147	155
Finland	259	228	228	223	225	253	283	288	268	294
France ^a	1,564	2,142	2,350	2,317	2,259	2,274	2,291	2,358	2,169	2,345
Saar ^b	29	46*	51*	36*	41	54	57*	63	57	50*
Germany	4,187 ^c	..	..	..	..	..	..	..	..	..
of which :										
U.K./U.S. Zone.	2,292	2,211	2,367	2,176	2,331	2,794	2,848*	..	..	..
Italy ^d	1,095	1,453	1,487	1,652	1,762	1,640	1,355	1,528	1,285	1,253
Netherlands . . .	295	438	581	390	366	484	501	525	469	509
Norway	827	908	912	1,043	977	1,216	1,322	1,343	1,256	1,368
Poland	665 ^c	618	624	568	604	708	..	..	..	..
Spain ^b	229	503	509	466	363	412	411	478	364	390
Sweden	680	1,063	1,080	1,191	1,141	1,344	1,397	1,390	1,401	1,401
Switzerland ^b . .	446	587	688	722	809	662	531	588	488	518
United Kingdom ^e	2,031	4,047	4,242	3,535	3,366	4,364	4,553	4,757	4,242	4,659
Other European countries . . .	718	701*	699*	757*	651*	805*	823*	841*	805*	822*
Total Europe (excluding U.S.S.R.) . .	14,146	18,701*	19,754*	18,723*	18,743*	21,268*	21,258*	22,074*	20,155*	21,546*
<i>Index numbers :</i>										
1938 = 100 . .	100	132	140	132	132	150	150	156	142	152
1947 = 100 . .	81	107	113	107	107	121	121	126	115	123
U.S.A. ^b	9,484	22,583	23,210	22,543	23,717	24,760	24,429	25,570	22,996	24,721

^a Figures relate to production of hydro-electric plants with a generating capacity of over 1,000 kilowatts and of thermo-electric plants with a capacity of over 5,000 kilowatts.

^b Public utility production only.

^c Production in post-war boundaries.

^d About 90 per cent of total production.

^e Authorized undertakings only. Excluding Northern Ireland.

Table VII

PRODUCTION OF CRUDE STEEL

*Monthly averages or calendar months**Thousands of tons*

Country	1938	1947	1948				1949	1949		
	Average	Fourth quarter	First quarter	Second quarter	Third quarter	Fourth quarter	First quarter	January	February	March
Austria	56	38	48	50	60	58	66	63	64	72
Belgium	190	285	311	291	341	363	382	370	359	416
Luxemburg . . .	120	166	177	198	213	230	236	228	226	254
Czechoslovakia .	147	201	215	226	215	227 *	230 *	..	..	..
France	518	464	580	620	598	616	758	733	717	825
Saar	214	67	71	93	119	124	143	138	133	158
Germany	1,631 ^a	..	..	..	..	..	..	..	..	..
of which :										
Western zones .	1,491	307	326	365	530	631	716 *	677	691	781
Hungary	54	55	60	64	68 *	66 *	65 *	..	..	..
Italy	194	154	163	186	183	175	150	159	145	146
Poland	163 ^b	144	152	157	163	164 *	165 *	..	..	..
Spain ^c	48	44	36	44	51	51	47 *	49	45 *	46 *
Sweden	81	107	105	107	91	117	115	103	116	127
United Kingdom	880	1,247	1,264	1,298	1,185	1,290	1,345	1,278	1,375	1,383
Other European countries . . .	201	127 *	145 *	157 *	167 *	168 *	169 *	165 *	167 *	177 *
Total Europe (excluding U.S.S.R.) . .	4,497	3,414 *	3,666 *	3,871 *	4,049 *	4,297 *	4,605 *	4,440 *	4,516 *	4,866 *
Index numbers :										
1938 = 100 . .	100	76	82	86	90	96	102	99	100	108
1947 = 100 . .	147	112	120	127	133	141	151	146	148	160
U.S.A.	2,400	6,710	6,659	6,364	6,629	7,120	7,273	7,424	6,786	7,610

^a Production in post-war boundaries, excluding the Saar.^b Production in post-war boundaries.^c Steel ingots only

Table VIII
PRODUCTION OF MOTOR VEHICLES

Monthly averages or calendar months

Thousands

Country	1938	1947	1948				1949	1949		
	Average	Fourth quarter	First quarter	Second quarter	Third quarter	Fourth quarter	First quarter	January	February	March
Passenger cars										
Czechoslovakia .	1.05 ^a	1.00	1.39	1.65	1.31	1.60	..	..	..	..
France	15.20 ^b	5.76	7.59	8.32	7.24	10.22	12.76	11.14	11.94	15.20
Germany :										
U.K./U.S.Zone	14.51 ^c	1.02	1.40	1.79	2.77	4.05	5.45	4.93	5.28	6.13
Italy	4.92	2.91	3.24	3.54	3.25	4.77	4.44	3.49	4.59	5.25
United Kingdom	28.42	24.94	26.97	29.68	28.18	26.77	31.61	31.09	29.93	33.81
Total of above countries . . .	64.10	35.63	40.59	44.98	42.75	47.41	55.86*	52.15*	53.34*	62.09*
Index numbers :										
1938 = 100 . .	100	56	63	70	67	74	87	81	83	97
1947 = 100 . .	193	108	123	136	129	143	169	157	161	187
U.S.A. ^d	166.75	329.35	309.98	281.98	335.58	375.56	350.99	326.02	324.55	402.40
Commercial vehicles										
Czechoslovakia .	0.33 ^a	0.53	0.59	0.59	0.53	0.75	..	..	..	..
France	3.28 ^b	5.26	7.72	8.25	6.47	8.75	8.71	8.35	8.45	9.34
Germany :										
U.K./U.S.Zone	3.03 ^c	1.08	1.49	1.58	2.72	3.79	4.16	3.82	3.94	4.73
Italy	0.98	1.36	1.22	1.27	1.20	1.48	1.47	1.16	1.21	2.03
United Kingdom	8.67	14.52	13.56	13.88	14.20	16.12	16.99	16.85	15.55	18.57
Total of above countries . . .	16.29	22.75	24.58	25.57	25.12	30.88	32.08*	30.88*	29.90*	35.47*
Index numbers :										
1938 = 100 . .	100	140	151	157	154	190	197	190	184	218
1947 = 100 . .	76	106	115	119	117	144	150	144	139	165
U.S.A. ^d	40.68	104.08	116.92	120.58	114.23	106.99	107.70	105.26	102.12	115.72

a 1937.

b October 1937-September 1938.

c 1936.

d Factory sales.

Table IX
PRODUCTION OF BUILDING BRICKS

Monthly averages or calendar months

Millions

Country	1938	1947	1948				1949	1949		
	Average	Fourth quarter	First quarter	Second quarter	Third quarter	Fourth quarter	First quarter	January	February	March
Austria	54	14	3	25	53	36	7	8	5	9
Belgium ^a	167	218	209	187	251	214	169	181	176	151
Czechoslovakia	94 ^b	72	21	77	127	83	20	23	18	21
France ^c	103	116	102	106	113	112	100	104	94	101
Germany :										
Western zones ^d	344 ^e	109	61	107	263	256	158	173	142	159
Netherlands ^f	84	78	80	72	79	94	91	93	89	90
Poland ^g	268 ^h	82	17	73	133	102	28 *	29	18	..
United Kingdom ⁱ	650	422	382	378	377	396	396	375	377	435
Total of above countries ^j	1,764	1,111	875	1,025	1,396	1,293	969 *	986	919	996 *
Index numbers :										
1938 = 100 . . .	100	63	50	58	79	73	55	56	52	56
1947 = 100 . . .	193	121	96	112	152	141	106	108	100	109
U.S.A.	302	469	360	495	559	535	378	389	346	400

^a Production of ornamental bricks, which varies from 7 per cent to 10 per cent of ordinary brick production, is excluded.

^b 1937.

^c Production of solid and hollow bricks. Home manufacture is excluded.

^d For the British Zone, firms employing 10 or more persons only. For the U.S. Zone, production of all types of clay bricks, including glazed bricks.

^e 1936.

^f Ordinary bricks only. Excluding sectional bricks, hollow bricks for flooring purposes, ornamental bricks and bricks made from sand and lime.

^g All State plants and co-operative and private establishments employing 20 or more workers only.

^h Production in post-war boundaries.

ⁱ Production of ordinary, facing and engineering bricks made from shale, sand, lime, clay or concrete. Production of Northern Ireland is excluded.

^j Neither pre-war nor post-war figures were available for a number of countries. For this reason no estimate was made of total European production. Very roughly estimated, the production of the countries listed in the table amounted to 85 per cent of total European production.

Table X
PRODUCTION OF CEMENT

*Monthly averages or calendar months**Thousands of tons*

Country	1938	1947	1948				1949	1949		
	Average	Fourth quarter	First quarter	Second quarter	Third quarter	Fourth quarter	First quarter	January	February	March
Austria ^a	54	24	34	61	74	71	60	47	52	80
Belgium	243	266	265	295	289	261	192	177	175	224
Denmark ^b	53	68	48	70	69	68	52	50	47	59
France ^c	296	316	389	468	502	435	466	382	462	556
Germany	1,162 ^d	..	..	..	..	..	..	..	..	..
of which :										
Western zones .	955	303	300	412	545	600	506	451	474	594
Soviet Zone .	207	..	..	..	..	..	..	..	..	..
Italy	384	275	203	258	310	299	245	200	240	295
Netherlands ^e . . .	38	50	48	46	54	49	42	49	30	46
Poland ^b	254 ^d	135	114	183	187	124	154	123	146	194
Portugal ^f	22	41	36	45	43	42	43	44	43	41
Sweden	83	141	102	141	124	129	93	92	89	99
Turkey	24	29	18	33	34	27	..	..	..	..
United Kingdom ^b	643	718	676	721	733	710	726	686	677	814
Other European countries . . .	419	312 *	300 *	358 *	386 *	365 *	347 *	319 *	326 *	395 *
Total Europe (excluding U.S.S.R.) . . .	3,675	2,739 *	2,599 *	3,158 *	3,447 *	3,244 *	3,041 *	2,725 *	2,842 *	3,546 *
Index numbers :										
1938 = 100 . .	100	75	71	86	94	88	83	74	77	96
1947 = 100 . .	144	107	102	124	135	127	119	107	111	139
U.S.A.	1,497	2,884	2,376	2,896	3,165	3,103	2,491	2,564	2,313	2,596

^a Artificial cements only.^b Portland cement only.^c Artificial cements only with pressure resistance of over 100 kilogrammes per square centimetre.^d Production in post-war boundaries.^e Portland cement and blast furnace slag cement.^f Factory sales of Portland cement.

Table XI
THE GENERAL LEVEL OF UNEMPLOYMENT
Thousands and percentages

Country	1948		1949		
	First quarter	Fourth quarter	First quarter		<i>Percentage of total</i>
	Unadjusted	Unadjusted	Adjusted		
All activities, excluding agriculture					
Austria	8	36	91	100	6
Belgium	65	120	165	165	8
Denmark	45	35	47	66	6
Finland	2	5	29	29	2
France	11	24	32	80	1
Germany : U.K./U.S. Zone	433	663	937	937	8
Ireland	39	33	43	50	10
Netherlands	42	42	58	58	2
Norway	16	7	13	15	2
Spain	82	85	94	94	2
Sweden	34	27	34	40	2
Switzerland	5	6	14	14	1
United Kingdom ^a	288	305	327	327	2
All activities, including agriculture					
Italy	1,700	1,660	1,883		
Poland	83	84	..		
Germany : Soviet Zone . . . . .	..	..	350		

Notes. — The table excludes agricultural unemployment (except for Italy, Poland and the Soviet Zone of Germany) but includes all other activities (industry, public services, domestic servants, etc.).

The unadjusted figures relate to unemployment data as published in national statistics and are not comparable between countries owing to different coverage. The figures for the first quarter 1949 have been adjusted in order to obtain more com-

parable results. These adjustments, however, are based largely on estimates.

Finally, unemployment (adjusted figures) was expressed as a percentage of the total number of wage and salary earners, employed and unemployed.

For sources and details, see Appendix.

a Excluding Northern Ireland.

Table XII
THE LEVEL OF EMPLOYMENT IN INDUSTRY
Index numbers based on 1938 and 1947

Country	Average 1938 = 100	Average 1947 = 100								
		1947	1947	1948			1949	1949		
	Average	Fourth quarter	First quarter	Second quarter	Third quarter	Fourth quarter	First quarter	January	February	March
Austria	119 ^a	108	110	113	116	119	121	120	121	123
Belgium	116 ^a	103	104	104	104	103	101	102	101	101
Czechoslovakia .	98 ^a	105	104	104	105	109	110	109	110	110
Finland	119	102	104	105	105	104	104	104	..	..
France ^b	106	101	102	103	104	105	105	..	..	..
Germany :										
U.K./U.S. Zone	85	104	107	110	113	118	121	..	..	..
French Zone ^b	..	105	106	110	116	125	128	125	129	130
Hungary . . . .	..	107	103	103	107	114	113	112	113	114
Ireland	121	102	104	105	105	..	..	..	..	..
Italy	118	100 *	98	100	100	..	..	..	..	..
Netherlands . . .	122	103	107	108	110	113	114	..	..	..
Norway	127	103	105	109	109	111	112	111	113	113
Poland	120 ^c	110	108	110	114	121	123 *	122	123	..
Sweden	122	100	100	101	100	102	101	101	101	102
Switzerland . . .	148	102	103	103	103	102	100	..	..	..
United Kingdom	108	104	104	104	105	105	106	106	106	106
Total of above countries :										
incl. Germany	103	103 *	104	105	106	108 *	109 *	..	..	..
excl. Germany	108	103 *	103	104	105	106 *	107 *	..	..	..
U.S.A.	161	103	104	102	105	105	101	102	101	100

^a 1937 = 100.

^b Excluding the Saar.

^c Post-war employment in post-war territory has been related to 1938 employment in the pre-war area.

Table XIII
THE LEVEL OF WHOLESALE PRICES
Index numbers based on 1938 and 1947

Country	Average 1938 = 100	Average 1947 = 100 (Mid-month figures)							
	1947	1947	1948				1949		
	Average	November	February	May	August	November	January	February	March
Austria	296 ^a	100 ^b	101 ^b	99 ^b	102 ^b	120 ^b	120 ^b	120 ^b	120 ^b
Belgium	357	104	110	110	110	110	110	108	106
Czechoslovakia	315	101	103	103	107	107	111	114	113
Denmark	207	103	105	109	112	112	113	113	113
Finland	724	117	125	132	135	134	132	131	130
France	989	122	155	167	180	200	197	192	189
Germany :									
U.K./U.S. Zone	155 ^c	..	..	..	111 ^d	123 ^d	124 ^d	123 ^d	122 ^d
Greece	18,320	115	131	138	140	147	160	161	..
Hungary	616 ^e	107	113	117	114	108	107	106	..
Ireland	219 ^f	106	106	106	105	106	105	106	106
Italy	5,159	109	104	100	111	110	110	110	108
Netherlands	265	102	103	103	103	107	109	109	108
Norway	175	101	103	103	103	104	104	104	105
Portugal	241 ^g	97	97	97	103	103	104	102	103
Spain	422 ^h	105	106	104	108	111	110	110	110
Sweden	179	103	105	108	109	109	109	109	109
Switzerland	209	103	105	104	103	104	103	102	102
Turkey	433	102	104	111	103	109	117	119	121
United Kingdom	189	106	113	115	115	115	115	115	115
U.S.A.	193	105	106	108	112	108	106	104	105

^a Fourth quarter 1947.^b Based on fourth quarter 1947.^c June 1948.^d Based on June 1948.^e August 1939 = 100.^f October 1938 = 100.^g Wholesale prices in Lisbon.^h 1936 = 100.

Table XIV
THE LEVEL OF IMPORT AND EXPORT PRICES
Index numbers — 1947 = 100

Country	Imports			Exports		
	1948 Highest month	1948 December	1949 March	1948 Highest month	1948 December	1949 March
United Kingdom	117 (December)	117	118	113 (December)	113	112
Switzerland	106 (April)	96	96	101 (March)	95	95
Denmark	114 (December)	114	111	126 (September)	125	123
Sweden	106 (June)	104	104	115 (March)	108	104
Finland	116 (September)	115	115	114 (October)	109	106

Notes: The index numbers have been taken from national statistics and are based on constant pre-war weights with the exception of the indices for the United Kingdom which are

based on constant post-war weights. The prices used are unit values derived from trade statistics except for Denmark and Sweden, where market quotations have been used.

Table XV

QUARTERLY MOVEMENTS IN THE VOLUME OF IMPORTS AND EXPORTS
OF EUROPEAN COUNTRIES

Index numbers — 1938 = 100

Country	Value in millions of dollars ^a	1938	1947	1948				1949
		Fourth quarter	First quarter	Second quarter	Third quarter	Fourth quarter	First quarter	
United Kingdom .	Imports	3,732	77	80	81	82	80	82
	Exports	2,291	118	126	134	138	147	156
Ireland	Imports	183	147	137	136	105	126 ^b	..
	Exports	118	85	61	57	76	85	..
France	Imports	1,198	93	88 ^c	111	105	108	106
	Exports	863	87	69 ^c	107	94	106	127
Belgium-Luxemburg . .	Imports	702	133	107	102	101	108	97
	Exports	721	66	81	93	93	115	114
Switzerland . . .	Imports	340	168	165	158	128	135	121
	Exports	301	126	106	124	121	152	113
Turkey	Imports	121	106	101	93	124	121	..
	Exports	122	82	70	69	59	174	..
Denmark	Imports	308	..	66	78	86	97	107
	Exports	335	..	74	65	68	82	84
Sweden	Imports	471	121	104	118	112	101	103
	Exports	463	90	60	81	85	95	65
Norway	Imports	262	106	82	98	95	127	109
	Exports	193	81	84	88	73	82	91
Finland ^d	Imports	163	86	77	92	78	90	89
	Exports	181	68	67	67	58	68	79
Austria ^e	Imports	263	32	36	44	51	56	65
	Exports	171	44	39	51	58	65	70
Czechoslovakia . .	Imports	262	96	121	112	98	91	112
	Exports	358	73	63	74	68	90	84
Poland	Imports	231	124	145	148	123	129 ^b	..
	Exports	223	63	76	92	103	111 ^b	..
Hungary	Imports	116	63	67	62	59	62	..
	Exports	148	31	35	36	31	69	..
Estimates for 19 European countries ^f	Imports	10,550	90	88 ^c	91	89	89	90
	Exports	8,640	80	79 ^c	89	90	102	102

^a The values of both imports and exports are shown on an f.o.b. basis.^b Average of 2 months.^c A comparison with data from other countries indicates that the official French volume indices for both imports and exports in the first quarter of 1948 are considerably too low. While the official index numbers are nevertheless shown in the table above, the estimated weighted index numbers for Europe have been calculated on the basis of adjusted French figures, the official index numbers having been raised by 45 per cent and 25 per cent for imports and exports, respectively.^d Seasonally adjusted.^e 1937 = 100. Excluding non-commercial imports.^f The totals are estimated on the basis of data from all countries for which either volume or value figures are available for the first quarter of 1949; i.e., the countries listed in the table (except Poland and Hungary) and, in addition, Iceland, Netherlands, Italy, Portugal and the U.K./U.S. Zone of Germany. Although it covers 90 per cent of the total trade of Europe in 1948, this sample is not quite representative for Europe as a whole since the volume of trade compared with pre-war for the countries not included in the sample is much smaller than that of the countries included in the sample.

Table XVI
ACC
imports

IMPORTS AND EXPORTS OF TEN EUROPEAN COUNTRIES
Millions of dollars in current prices

Area of origin for imports and area of destination for exports ↓	Year and quarter	United Kingdom		France		Netherlands		Belgium-Luxemburg		Switzerland		Italy		Denn
		Imports ^a		Exports		Imports		Exports		Imports		Exports		Imports
		Imports	Exports	Imports	Exports	Imports	Exports	Imports	Exports	Imports	Exports	Imports	Exports	Imports
I. United Kingdom, Ireland and Iceland	1948 I	44.8	88.6	31.3	34.4	40.4	25.2	50.0	45.7	24.3	6.7	6.8	10.4	24.7
	II	48.6	76.5	26.2	36.9	48.0	42.7	59.2	36.5	25.4	8.5	12.3	15.0	39.1
	III	48.7	75.2	23.9	36.9	49.3	44.2	43.6	36.3	17.6	9.0	13.9	24.8	60.2
	IV	60.2	80.7	21.2	45.7	59.4	46.8	44.5	44.7	17.4	9.9	19.2	36.4	63.2
	1949 I	55.2	80.4	31.2	60.3	67.4	49.2	43.9	44.0	15.7	7.5	18.6	27.3	65.8
II. Western European industrial countries (France, Netherlands, Belgium, Luxembourg, Switzerland)	1948 I	129.6	136.5	93.0	70.8	92.8	66.2	89.1	135.0	58.2	45.5	19.8	44.2	19.3
	II	133.6	151.6	63.2	88.9	112.9	66.3	108.9	133.9	57.2	51.1	25.2	51.8	23.7
	III	134.3	130.6	59.2	81.8	99.7	61.5	105.0	120.1	49.5	49.3	25.4	41.3	29.6
	IV	163.4	134.9	71.2	92.1	111.0	90.1	120.4	129.1	53.0	58.2	26.0	37.5	35.8
	1949 I	173.8	150.1	46.8	99.5	118.5	65.0	98.9	112.7	47.8	40.1	34.7	40.6	39.0
III. Mediterranean and Iberian countries (Italy, Greece, Spain, Portugal, Turkey and miscellaneous continental and non-continental European countries and territories)	1948 I	60.6	72.2	17.3	6.2	12.5	8.3	15.8	17.0	26.1	19.3	10.2	12.2	8.5
	II	68.5	86.8	32.8	11.8	11.5	11.2	20.3	20.9	25.4	22.4	6.6	8.5	8.5
	III	59.3	98.0	22.7	16.8	9.2	10.4	17.8	19.7	22.4	21.2	7.3	8.7	6.4
	IV	94.8	96.9	26.3	20.6	10.7	17.1	14.9	25.4	25.5	25.9	8.3	13.2	6.0
	1949 I	83.9	96.9	36.7	30.8	15.2	22.0	15.2	26.9	21.5	21.8	8.3	9.6	8.9
IV. Scandinavian countries (Denmark, Sweden, Norway, Finland)	1948 I	124.2	87.8	33.4	19.8	27.2	22.0	35.6	43.6	16.1	9.9	14.5	16.6	18.3
	II	140.7	142.3	31.2	34.0	30.6	29.3	43.2	48.8	14.4	10.2	11.6	16.3	27.8
	III	172.9	162.0	29.7	33.1	42.7	32.2	49.5	41.8	16.7	12.4	8.6	14.3	31.3
	IV	173.7	165.7	31.9	34.7	44.9	40.5	46.0	45.4	15.4	16.7	17.6	26.7	29.4
	1949 I	146.4	152.9	31.3	38.6	31.3	34.9	40.0	51.5	11.0	13.8	18.0	17.3	26.0
V. Germany and Austria	1948 I	28.0	30.5	32.4 ^b	7.0 ^b	17.2	8.4	23.8	10.9	21.5	5.1	10.5	4.9	10.9
	II	35.1	26.9	45.1	36.4	27.5	24.2	28.1	26.0	25.6	9.8	12.6	15.2	7.2
	III	32.5	26.6	54.5	39.5	32.7	15.4	35.3	20.1	23.4	7.1	14.5	14.7	9.3
	IV	33.8	30.7	52.7	31.0	30.7	22.7	37.6	31.2	28.8	10.8	17.6	14.8	15.6
	1949 I	38.1	35.5	57.2	37.3	34.3	24.7	36.8	51.9	22.1	12.2	19.6	23.3	11.4
VI. Eastern European countries (Czechoslovakia, Poland, Rumania, Hungary, Yugoslavia, Bulgaria)	1948 I	24.5	21.2	13.0	5.7	21.7	11.4	8.6	11.0	20.8	16.3	12.0	13.0	12.0
	II	28.6	19.4	13.5	9.1	24.0	14.1	8.3	13.0	16.8	13.9	15.2	11.8	14.4
	III	30.6	16.1	14.6	10.4	22.5	10.7	7.8	13.9	11.9	14.1	14.6	18.7	15.0
	IV	34.6	19.4	16.1	11.0	24.9	16.4	12.3	14.9	16.0	14.6	17.8	21.7	10.4
	1949 I	41.0	19.8	18.5	16.1	28.4	15.7	9.9	15.9	12.1	12.6	23.6	13.8	18.8
VII. Union of Soviet Socialist Republics	1948 I	8.5	5.1	2.4	—	0.7	2.1	6.8	0.3	0.6	0.3	1.3	0.4	10.0
	II	37.5	3.7	3.2	—	0.1	0.2	16.5	4.9	1.3	0.2	0.8	0.8	1.1
	III	41.5	6.4	2.7	—	0.1	0.4	20.2	8.7	1.9	2.4	1.2	1.5	1.1
	IV	21.5	6.2	2.3	—	2.5	1.8	6.6	6.3	1.2	4.6	0.8	1.1	2.2
	1949 I	9.1	9.4	1.7	—	0.9	3.6	1.1	9.0	0.6	2.4	0.3	3.9	1
VIII. Total Europe (including U.S.S.R.)	1948 I	420.2	441.9	222.8	143.9	212.5	143.6	229.7	263.5	167.6	103.1	75.1	101.7	104
	II	492.6	507.2	215.2	218.0	254.6	188.0	284.5	284.0	166.1	116.1	84.3	119.4	122
	III	519.8	514.9	207.3	218.5	256.2	174.8	279.2	260.6	143.4	115.5	85.5	124.0	153
	IV	582.0	534.5	221.7	235.1	284.1	235.4	282.3	297.0	157.3	140.7	107.3	151.4	162
	1949 I	547.5	545.0	223.4	282.6	296.0	215.1	245.8	311.9	130.8	110.4	123.1	135.8	170
IX. United States and Canada	1948 I	447.1	128.6	149.5	9.7	111.3	7.0	116.1	18.5	77.6	24.4	150.3	22.4	21
	II	399.9	129.3	162.1	19.7	82.4	6.9	81.8	27.1	61.8	25.9	170.4	23.7	27
	III	398.5	140.8	136.9	21.2	93.6	12.2	83.0	31.6	50.1	28.4	120.9	25.4	21
	IV	369.9	148.0	123.7	22.5	87.1	10.9	102.9	38.7	54.5	34.9	152.6	30.4	35
	1949 I	396.5	141.8	170.9	18.2	92.0	9.2	87.6	40.8	64.4	24.4	151.1	16.2	40
X. Other overseas countries	1948 I	1,085.6	825.1	475.2	207.8	102.6	44.5	156.7	103.5	73.8	45.6	129.3	64.6	1
	II	1,213.4	932.4	484.0	303.0	126.2	57.8	134.4	109.9	104.7	54.1	148.1	100.8	20
	III	1,175.2	966.7	415.8	280.8	129.4	62.8	119.8	111.0	49.6	46.5	151.8	120.8	1
	IV	1,170.1	1,046.0	525.8	310.6	123.7	71.8	116.6	124.1	52.1	60.6	123.1	182.8	1
	1949 I	1,201.6	1,151.5	469.1	408.4	120.1	95.8	126.1	110.8	48.5	53.1	127.0	135.9	1
XI. Total overseas countries	1948 I	1,532.7	953.7	624.7	217.5	213.9	51.5	272.8	122.0	151.4	70.0	279.6	87.0	4
	II	1,613.3	1,061.7	646.1	322.7	208.6	64.7	216.2	137.0	166.5	80.0	318.5	124.2	4
	III	1,573.7	1,107.5	552.7	302.0	223.0	75.0	202.8	142.6	99.7	74.9	272.7	146.2	3
	IV	1,540.0	1,194.0	649.5	333.1	210.8	82.7	219.5	162.8	106.6	95.5	275.7	213.2	4
	1949 I	1,598.1	1,293.3	640.0	426.6	212.1	105.0	213.7	151.6	112.9	77.5	278.1	152.1	5
XII. TOTAL WORLD	1948 I	1,952.9	1,395.6	847.5	361.4	426.4	195.1	502.5	385.5	319.0	173.1	354.7	188.7	1
	II	2,105.9	1,568.9	861.3	540.7	463.2	252.7	500.7	421.0	332.6	196.1	402.8	243.6	1
	III	2,093.5	1,622.4	760.0	520.5	479.2	249.8	482.0	403.2	243.1	190.4	358.2	270.2	1
	IV	2,122.0	1,728.5	871.2	568.2	494.9	318.1	501.8	459.8	263.9	236.2	383.0	364.6	2
	1949 I	2,145.6	1,838.3	863.4	709.2	508.1	320.1	459.5	463.5	243.7	187.9	401.2	287.9	2

^a General imports.^b The increase in the trade of the U.K./U.S. Zone of Germany with Western European industrial countries (Group II) and that of France with Germany and Austria (Group V) after the first quarter of 1948

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ACCORDING TO AREAS OF ORIGIN AND DESTINATION
imports c.i.f.; exports f.o.b.

Denmark		Sweden		Norway		Germany (U.K./U.S. Zone)		Total of ten countries		Trade of ten countries in 1948 as percentage of total European trade with each group		Year and quarter	Area of origin for imports and area of destination for exports
Imports	Exports	Imports	Exports	Imports	Exports	Imports	Exports	Imports	Exports	Imports	Exports		
24.7	43.3	35.5	28.8	23.5	17.8	18.4	10.2	299.7	311.1	69	64	1948 I	I. United Kingdom, Ireland and Iceland
39.1	45.8	67.5	46.0	29.8	15.5	15.9	16.1	372.0	339.5			II	
60.2	44.9	67.8	57.4	35.8	13.0	23.3	21.5	384.1	363.2			III	
63.2	40.9	65.1	66.1	48.4	20.7	13.8	22.4	412.4	414.3			IV	
65.8	54.9	47.9	35.8	38.5	22.9	16.4	26.7	400.6	409.0			1949 I	
19.3	28.1	57.0	43.8	18.6	16.7	10.3 ^b	47.5 ^b	587.7	634.3	84	84	1948 I	II. Western European industrial countries
23.7	22.8	70.7	60.0	22.2	19.7	41.1	65.6	658.7	712.6			II	
29.6	31.5	67.1	58.4	21.7	19.3	29.5	88.1	621.0	681.9			III	
35.8	27.4	63.0	56.5	31.6	18.8	33.4	91.4	708.8	736.0			IV	
39.0	35.5	54.3	37.9	33.1	18.6	52.9	109.1	699.8	709.1			1949 I	(France, Netherlands, Belgium, Luxembourg, Switzerland)
8.5	10.3	20.6	13.1	7.0	6.6	2.7	8.4	181.3	173.6	79	77	1948 I	III. Mediterranean and Iberian countries
8.5	6.3	16.9	10.0	8.5	4.9	16.6	7.1	215.6	189.9			II	
6.4	4.3	15.1	16.1	9.6	5.6	19.5	9.8	189.3	210.6			III	
6.0	9.6	23.1	23.6	14.3	7.1	18.7	10.0	242.6	249.4			IV	
8.9	8.9	24.3	19.8	8.9	6.8	19.6	13.6	242.5	257.1			1949 I	(Italy, Greece, Spain, Portugal, Turkey and miscellaneous continental and non-continental European countries and territories)
18.3	22.1	18.7	21.1	21.8	15.7	16.4	14.9	326.2	273.5	76	79	1948 I	IV. Scandinavian coun- tries
27.8	24.7	23.0	45.9	34.5	20.2	24.8	13.3	381.8	385.0			II	
31.3	21.6	29.7	35.5	27.9	16.9	25.3	14.7	434.3	384.5			III	
29.4	42.9	34.9	65.3	57.7	18.8	21.8	20.7	473.3	477.4			IV	
26.0	22.2	24.3	45.9	41.4	14.9	34.4	23.4	404.1	415.4			1949 I	(Denmark, Sweden, Norway, Finland)
10.9	12.1	10.1	4.8	7.0	7.1	2.4	10.7	163.8	101.5	76	82	1948 I	V. Germany and Austria
7.2	7.5	15.5	11.4	4.4	8.6	4.7	10.7	205.8	176.7			II	
9.3	7.9	11.4	10.3	3.8	2.9	3.4	12.7	220.8	157.2			III	
15.0	13.8	11.0	18.0	5.1	5.5	3.0	14.7	235.3	193.2			IV	
11.4	16.1	16.2	16.7	9.3	13.8	3.2	14.9	248.2	246.4			1949 I	
12.4	5.9	27.2	13.0	5.9	5.1	1.6	0.9	147.7	103.5	36	43	1948 I	VI. Eastern European countries
14.3	3.4	30.8	17.3	12.1	6.3	4.7	1.3	168.3	109.6			II	
15.1	9.3	32.7	20.8	4.6	4.5	4.1	2.6	158.5	121.1			III	
10.9	7.4	33.7	25.2	11.0	6.4	9.8	4.2	187.1	141.2			IV	
18.2	6.6	37.2	18.2	12.5	8.9	19.2	9.4	220.6	137.0			1949 I	(Czechoslovakia, Poland, Ru- mania, Hungary, Yugoslavia, Bulgaria)
10.5	10.9	1.4	1.5	7.1	0.6	0.8	—	40.1	21.2	23	37	1948 I	VII. Union of Soviet Socialist Republics
1.9	2.6	3.3	3.1	14.7	7.7	0.4	—	79.7	23.2			II	
1.3	1.5	5.2	5.0	4.8	6.1	0.4	—	79.3	32.0			III	
2.4	3.5	2.2	7.3	0.5	5.1	0.3	—	40.3	35.9			IV	
1.1	1.3	0.4	3.8	0.8	2.7	—	—	16.0	36.1			1949 I	
104.6	132.7	170.5	126.1	90.9	69.6	52.6	92.6	1,746.5	1,618.7	71	70	1948 I	VIII. Total Europe (including U.S.S.R.)
122.5	113.1	227.7	193.7	126.2	82.9	108.2	114.1	2,081.9	1,936.5			II	
153.2	121.0	229.0	203.5	108.2	68.3	105.5	149.4	2,087.3	1,950.5			III	
162.7	145.5	233.0	262.0	168.6	82.4	100.8	163.4	2,299.8	2,247.4			IV	
170.4	145.5	204.6	178.1	144.5	88.6	145.7	197.1	2,231.8	2,210.1			1949 I	
21.6	2.2	71.9	21.7	36.6	7.0	104.2	4.7	1,286.2	246.2	80	84	1948 I	IX. United States and Canada
27.0	2.2	47.1	30.7	23.1	6.3	240.7	2.9	1,296.3	274.4			II	
21.4	2.3	40.8	18.5	32.4	10.4	241.1	7.1	1,218.7	297.9			III	
35.7	7.6	40.7	13.7	33.1	9.3	121.6	12.2	1,121.8	328.2			IV	
40.7	2.4	31.7	11.3	31.3	8.8	171.2	14.6	1,237.4	287.7			1949 I	
14.4	7.1	81.2	59.2	28.7	17.3	43.1	3.4	2,190.6	1,378.1	93	89	1948 I	X. Other overseas countries
20.1	8.3	84.1	58.9	27.2	20.3	75.9	7.5	2,418.1	1,653.0			II	
13.1	8.8	76.4	50.3	33.9	19.3	98.4	12.4	2,263.4	1,679.4			III	
12.7	11.1	52.5	63.0	30.4	18.9	59.3	22.3	2,266.3	1,911.2			IV	
12.2	10.1	68.7	55.1	25.5	17.4	95.2	24.8	2,294.0	2,062.9			1949 I	
36.0	9.3	153.1	80.9	65.3	24.3	147.3	8.1	3,476.8	1,624.3	91	87	1948 I	XI. Total overseas countries
47.1	10.5	131.2	89.6	50.3	26.6	316.6	10.4	3,714.4	1,927.4			II	
34.5	11.1	117.2	68.8	66.3	29.7	339.5	19.5	3,482.1	1,977.3			III	
48.4	18.7	93.2	76.7	63.5	28.2	180.9	34.5	3,388.1	2,239.4			IV	
52.9	12.5	100.4	66.4	56.8	26.2	266.4	39.4	3,531.4	2,350.6			1949 I	
140.6	142.0	323.6	207.0	156.2	93.9	199.9	100.7	5,223.3	3,243.0	79	80	1948 I	XII. TOTAL WORLD
169.6	123.6	358.9	283.3	176.5	109.5	424.8	124.5	5,796.3	3,863.9			II	
187.7	132.1	346.2	272.3	174.5	98.0	445.0	168.9	5,569.4	3,927.8			III	
211.1	164.2	326.2	338.7	232.1	110.6	281.7	197.9	5,687.9	4,486.8			IV	
223.3	158.0	305.0	244.5	201.3	114.8	412.1	236.5	5,763.2	4,560.7			1949 I	

is partly attributable to the fact that trade between the Saar and other German areas was not included in the underlying trade returns before 1 April 1948 but was included thereafter, following incorporation of the Saar in the French customs area.

Table XVII
IMPORTS AND EXPORTS OF EIGHT EUROPEAN COUNTRIES

Product ^a	Year and quarter	Unit	United Kingdom		France		Netherlands		Belgium-Luxembourg		Switzerland
			Imports	Exports	Imports	Exports	Imports	Exports	Imports	Exports	
1. Cereals	1948 I	Thousand tons (expressed in grain equivalent)	1,659.1	16.4	250.8	—	401.6	18.6	507.2	40	237.5
	II		2,113.5	3.8	664.1	0.2	408.3	37.2	242.2	123	272.0
	III		2,076.7	7.0	703.5	0.4	335.3	1.7	369.3	28	113.8
	IV		2,047.7	22.7	168.2	81.4	462.0	1.7	417.9	5	145.7
2. Meat	1949 I		1,863.5	10.0	375.0	177.7	310.9	28.8	386.9	9	207.0
	1948 I	Thousand tons	307.6	0.2	0.4	0.2	4.3	1.6	17.9	0	4.0
	II		243.7	0.1	10.3	0.3	11.9	3.0	16.3	4	4.0
	III		280.4	0.1	5.3	0.4	13.7	0.3	12.6	2	3.7
3. Oil seeds and nuts	1949 IV		198.0	0.2	3.9	0.2	3.8	3.6	21.4	0	3.2
	I		185.6	0.1	4.0	0.4	11.1	5.9	16.4	0	1.5
	1948 I	Thousand tons	257.0	—	50.8	0.1	49.8	5.7	40.0	2	18.7
	II		256.4	—	194.7	0.1	42.0	1.4	27.2	12	13.8
4. Coal and coke	III		273.0	—	121.0	0.1	71.2	0.8	27.7	—	10.3
	IV		239.3	—	64.6	0.4	47.2	1.7	35.5	4	17.8
	1949 I		289.8	—	223.8	0.1	96.9	7.5	45.5	2	26.8
	1948 II		60.3	1,086.1	2,847.4	38.0	782.9	240.5	2,165.7	324	854.1
5. Mineral oil, crude and refined	III	Thousand tons (expressed in crude equivalent)	23.8	3,013.1	4,272.8	1,216.5	928.7	265.0	1,262.5	373	834.7
	IV		2.3	3,736.2	4,713.3	1,429.6	1,075.3	243.2	1,179.1	344	645.6
	1949 I		1.3	3,916.5	5,177.3	1,267.4	973.6	233.5	1,193.7	504	708.0
	II		3.3	3,510.5	5,581.8	1,357.8	909.9	211.5	1,090.0	178	606.5
6. Crude steel	1948 I	Thousand tons	3,868.8	28.6	1,459.7	94.9	506.1	30.4	544.4	247	233.0
	II		5,223.2	55.4	2,369.2	187.6	774.3	21.6	675.3	144	218.6
	III		5,431.7	50.3	2,333.9	336.4	635.6	112.4	655.7	195	191.3
	IV		4,479.0	68.1	2,469.5	391.9	781.8	136.0	558.7	169	255.3
7. Finished steel	1949 I		5,132.0	78.6	2,919.8	506.0	600.6	291.5	509.5	142	239.0
	1948 I	Thousand tons	40.1	1.1	2.8	0.9	0.2	—	0.6	239	47.5
	II		40.7	1.8	2.2	3.5	0.2	0.2	0.6	29.8	45.3
	III		54.3	1.6	19.3	8.3	1.0	—	1.6	54.4	27.4
8. Machinery ^d	IV		64.0	1.4	11.1	10.9	0.4	—	1.3	93.8	25.1
	1949 I		83.5	0.2	2.4	13.0	0.7	0.1	1.4	68.8	21.7
9. Wool yarn	1948 I	Thousand tons	28.8	352.0	59.5	85.1	225.9	10.3	15.4	645.5	162.3
	II		40.4	369.4	58.2	230.6	289.5	13.5	14.9	755.4	140.7
	III		47.5	385.8	149.9	243.2	259.4	13.4	12.8	756.2	107.9
	IV		97.7	457.2	52.2	249.0	244.9	14.7	14.6	883.3	105.4
10. Cotton yarn	1949 I		90.8	455.1	55.3	338.0	266.8	17.0	15.2	906.9	100.5
	1948 I	Million dollars	44.5	275.8	43.7	33.1	40.1	21.6	38.4	29.0	20.3
	II		52.1	343.3	41.6	53.4	50.0	24.3	41.8	34.9	19.8
	III		47.0	338.0	40.0	53.6	49.2	22.0	40.2	28.7	18.7
11. Cotton tissue	IV		40.0	357.5	35.7	49.4	50.6	29.1	41.2	32.0	16.8
	1949 I		50.1	371.7	37.6	65.3	61.3	32.6	37.6	34.3	17.8
9. Wool yarn	1948 I	Thousand tons	1.3	1.8	0.1	2.3	2.0	0.2	0.3	2.3	1.4
	II		1.7	2.2	0.1	2.9	1.9	0.2	0.3	1.8	1.1
	III		0.8	2.6	—	2.8	1.7	0.2	0.2	2.0	1.4
	IV		0.6	3.0	0.1	3.6	2.2	0.3	0.3	2.1	0.8
10. Cotton yarn	1949 I		0.7	3.5	0.1	3.2	2.5	0.1	0.1	2.0	0.8
	1948 I	Thousand tons	1.2	5.7	0.4	0.7	1.3	—	1.0	2.2	1.1
	II		1.2	5.9	0.5	1.3	1.6	—	0.6	2.9	0.8
	III		0.6	7.4	1.5	1.3	1.7	—	0.3	2.9	0.8
11. Cotton tissue	IV		0.3	7.8	0.9	1.1	2.2	0.1	0.6	3.3	0.8
	1949 I		0.2	10.5	0.4	1.3	2.3	0.1	0.4	3.7	0
11. Cotton tissue	1948 I	Thousand tons	4.4	17.9	1.8	5.5	0.9	2.3	0.6	4.6	1
	II		4.6	19.3	0.8	7.6	0.7	3.4	0.7	3.6	0
	III		7.2	22.9	2.0	7.7	1.0	3.5	0.4	3.8	0
	IV		9.3	24.1	2.4	10.3	1.3	3.7	0.3	3.9	0
11. Cotton tissue	1949 I		10.1	27.2	1.1	14.6	1.5	4.3	0.7	3.9	0

^a For composition of commodity groups, see Appendix.

^b Monthly figures for Sweden are available only for selected items which, however, cover from 80 to 90 per cent of the total trade for most of the commodity groups.

**Table XVII
OPEN COUNTRIES IN SELECTED COMMODITIES**

Imports Exports	Switzerland		Italy		Sweden ^b		Germany (U.K./U.S. Zone)		Total of selected countries		Unit	Year and quarter	Product ^a
	Imports	Exports	Imports	Exports	Imports	Exports	Imports	Exports	Imports	Exports			
40	237.5	—	815.5	0.1	95.2	1.3	933.1	—	4,900.0	76.4	Thousand tons (expressed in grain equivalent)	1948 I	1. Cereals
121	272.0	—	998.5	1.2	63.3	1.9	1,380.0 ^c	—	6,141.9	168.2		1948 II	
28	113.8	—	516.1	0.4	62.0	10.9	1,380.0 ^c	—	5,556.7	48.8		1948 III	
5	145.7	—	602.2	3.6	41.8	6.2	1,086.2	—	4,971.7	121.2		1948 IV	
9	207.0	—	647.1	—	55.8	9.1	958.3	58.5	4,804.5	293.6		1949 I	
0	4.0	—	2.5	—	1.4	0.1	—	—	338.1	2.9	Thousand tons	1948 I	2. Meat
4	4.0	0.3	1.6	—	1.0	—	13.9 ^c	—	302.7	7.9		1948 II	
2	3.7	0.1	2.9	—	0.8	—	13.9 ^c	—	333.3	3.7		1948 III	
0	3.2	0.5	2.7	—	5.6	—	16.7	—	255.3	4.7		1948 IV	
0	1.5	1.3	2.5	—	3.4	0.1	9.8	—	234.3	7.9		1949 I	
29	18.7	—	10.1	0.4	8.2	—	12.3	—	446.9	9.1	Thousand tons	1948 I	3. Oil seeds and nuts
11	13.8	0.1	11.6	0.4	9.3	—	3.7 ^c	—	558.7	3.2		1948 II	
—	10.3	—	10.7	0.3	9.1	—	3.7 ^c	—	526.7	1.2		1948 III	
4	17.8	—	33.1	0.3	6.7	—	4.5	0.2	448.7	6.9		1948 IV	
2	26.8	—	33.5	0.3	17.4	—	5.4	0.1	739.1	10.0		1949 I	
324	854.1	0.1	1,831.7	0.4	1,683.0	—	66.4	2,666.6	10,291.5	4,355.9	Thousand tons	1948 I	4. Coal and coke
373	834.7	0.1	2,241.4	0.2	2,050.0	—	601.5 ^c	2,814.9 ^c	12,215.4	7,682.8		1948 II	
344	645.6	0.1	2,492.8	12.9	1,894.0	—	601.5 ^c	2,814.9 ^c	12,603.9	8,581.8		1948 III	
504	708.0	—	1,837.3	47.0	1,607.0	—	687.6	2,834.3	12,185.8	8,803.4		1948 IV	
178	606.5	0.6	1,906.6	54.9	1,793.0	—	712.9	3,381.5	12,604.0	8,694.8		1949 I	
247	233.0	0.2	638.4	0.1	1,097.4	—	303.6	0.1	8,651.4	401.6	Thousand tons (expressed in crude equivalent)	1948 I	5. Mineral oil, crude and refined
144	218.6	0.4	744.6	0.1	901.2	—	247.0 ^c	0.2 ^c	11,153.4	410.0		1948 II	
195	191.3	0.8	615.0	0.4	830.1	—	247.0 ^c	0.2 ^c	10,940.3	696.2		1948 III	
169	255.3	0.4	763.2	5.7	715.5	—	856.2	1.3	10,879.2	773.1		1948 IV	
142	239.0	—	565.2	2.2	740.4	—	467.4	34.3	11,173.9	1,054.8		1949 I	
239	47.5	0.3	9.8	—	—	0.5	—	—	101.0	26.7	Thousand tons	1948 I	6. Crude steel
29.8	45.3	0.1	9.8	—	—	1.4	—	0.7 ^c	98.8	37.5		1948 II	
54.4	27.4	0.6	9.5	—	—	1.4	—	0.7 ^c	113.1	67.0		1948 III	
93.8	25.1	2.2	5.5	—	—	1.7	—	3.6	107.4	113.6		1948 IV	
68.8	21.7	0.7	5.0	—	—	1.2	0.1	5.8	114.8	89.8		1949 I	
645	162.3	1.5	95.6	15.9	174.4	20.6	0.2	11.8	762.1	1,142.7	Thousand tons	1948 I	7. Finished steel
755	140.7	1.7	59.1	22.2	178.6	22.6	4.8 ^c	51.0 ^c	786.2	1,466.4		1948 II	
756	107.9	1.9	30.5	27.6	167.5	20.2	4.8 ^c	51.0 ^c	780.3	1,499.3		1948 III	
883	105.4	1.8	30.2	44.0	131.0	29.6	8.1	46.4	684.1	1,726.0		1948 IV	
906	100.5	1.5	41.5	45.9	153.3	26.0	19.9	89.8	743.3	1,880.2		1949 I	
29.0	20.3	39.8	3.3	24.0	22.7	16.3	0.3	3.1	213.3	442.7	Millions dollars	1948 I	8. Machinery ^d
349	19.8	45.9	5.1	29.5	21.6	19.3	1.4 ^c	8.6 ^c	233.4	559.2		1948 II	
287	18.7	48.3	5.6	32.4	23.8	19.5	1.4 ^c	8.6 ^c	225.9	551.1		1948 III	
320	16.4	54.7	6.4	45.9	23.3	24.7	2.8	16.4	216.4	609.7		1948 IV	
343	17.8	48.8	10.9	37.7	21.5	25.4	4.8	20.1	241.6	635.9		1949 I	
23	1.4	0.1	—	0.9	1.3	—	—	0.2	6.4	7.8	Thousands tons	1948 I	9. Wool yarn
1.8	1.2	0.1	0.1	0.9	1.4	—	—	0.3 ^c	6.7	8.4		1948 II	
2.0	1.0	0.1	—	0.9	1.1	—	—	0.3 ^c	4.8	8.9		1948 III	
2.1	1.1	0.1	—	1.1	0.9	—	—	0.3	5.2	10.5		1948 IV	
2.0	0.8	0.1	—	0.7	0.5	—	0.1	0.1	4.8	9.7		1949 I	
2.2	1.5	0.3	—	6.7	1.0	—	0.1	0.1	6.5	15.7	Thousands tons	1948 I	10. Cotton yarn
2.9	0.9	0.3	—	7.7	1.4	—	0.1 ^c	0.1 ^c	6.3	18.2		1948 II	
2.9	0.4	0.3	—	8.5	1.8	—	0.1 ^c	0.1 ^c	6.4	20.5		1948 III	
3.3	0.3	0.3	0.1	11.7	2.5	—	0.2	0.7	7.1	25.0		1948 IV	
3.7	0.1	0.5	—	9.0	2.2	—	0.5	0.3	6.1	25.4		1949 I	
4.6	1.1	0.5	—	1.7	2.1	—	—	2.4	10.9	34.9	Thousands tons	1948 I	11. Cotton tissue
3.6	0.8	0.4	—	2.9	3.0	—	0.2 ^c	4.5 ^c	10.8	41.7		1948 II	
3.8	0.7	0.3	—	4.1	2.0	—	0.2 ^c	4.5 ^c	13.5	46.8		1948 III	
3.9	0.5	0.6	—	6.7	1.9	—	0.1	8.5	15.8	57.8		1948 IV	
3.9	0.4	0.6	0.1	5.3	2.1	—	0.1	6.4	16.1	62.3		1949 I	

^c Average of second and third quarters.

^d Imports are shown on a c.i.f. basis, exports on an f.o.b. basis.

NOTES TO THE STATISTICS

1. GENERAL

The statistical series contained in this section are generally a continuation of those published in the *Economic Survey of Europe in 1948*. For sources and methods of computation, reference should be made to the above-mentioned publication, in which they were fully described. In a few cases where revised or additional data have been used, explanations are given below.

The tables include information received up to 1 July 1949. In general, the most recent figures are to be regarded as provisional and subject to later revision.

Slight discrepancies between constituent items and the totals as shown in the tables are due to rounding.

2. INDEX NUMBERS OF INDUSTRIAL PRODUCTION (TABLES I-IV)

The index numbers selected are, in most cases, adjusted for the number of working-days, but, except for Sweden and the United States, they are not adjusted for seasonal fluctuations.

The index numbers shown for Poland relate to post-war output within the post-war boundaries and to pre-war output within the pre-war boundaries. The weighted totals, however, including and excluding Germany, are based on constant (present) territories. The methods used to arrive at these "constant territory" index numbers are the same as those described in the *Economic Survey of Europe in 1948*, Appendix B, Section I.4.

(i) GENERAL INDEX NUMBERS OF INDUSTRIAL PRODUCTION (TABLE I)

Revisions and Additions :

Finland :

Tilastokatsauksia.

Kansallis Osake Pankki, Helsinki.

The quarterly index numbers were taken from the second source listed. They were shifted from the original 1938 base by use of data shown in *Tilastokatsauksia*, January-February 1949. The pre-war link was also taken from the latter source.

Germany :

Bulletin statistique du Commandement en Chef français en Allemagne.

The index for the French Zone given in this publication was combined with that of the U.K./U.S. Zone by using the values added in 1936 [derived from : *Economic Data on Postdam Germany*, Report of the Military Governor for Germany (U.S. Zone)] as weights.

Greece :

Monthly Indicator of Industrial Production in Greece. Federation of Greek Industries, Athens.

The index for mining has been combined with that for industrial production.

Italy :

Notiziario Istat.

Official index numbers are now published on a 1938 base.

Poland :

The index numbers for the first quarter 1949 were estimated by linking the index numbers and other production data shown in *Wiadomosci Statystyczne* to those published by the Instytut Gospodarstwa Narodowego, from which source the figures for other quarters were also taken.

United Kingdom :

The index based on 1946 was shifted back to a 1938 base by use of data published in *Studies in Official Statistics No. 1 : The Interim Index of Industrial Production.*

United States :

Federal Reserve Bulletin.

The weights used in calculating the weighted averages for Europe are those shown in Table G of the *Economic Survey of Europe in 1948*. Finland was added with a weight of 0.6.

(ii) INDEX NUMBERS FOR PARTICULAR INDUSTRIES

The sources and methods used are the same as those for the general indices unless otherwise stated. The following notes indicate the exceptions and give further particulars of the definitions of series selected and of the weighting systems applied.

(a) *Engineering Industry (Table II)*

The table showing metal-making and engineering activity published in the *Economic Survey of Europe in 1948* was replaced by a table for engineering only, covering in general mechanical and electrical engineering, vehicles and shipbuilding. The data were for the most part derived from the sources quoted in the *Economic Survey of Europe in 1948* with the following exceptions in the sources or definitions :

Austria :	<i>Statistical Annex to the Report of the United States High Commissioner.</i>
	Index for machinery.
Denmark :	Index for iron and metal industry and transport equipment (weights 65 and 35 respectively).
Netherlands :	Index for the metal industry.
United States :	Index for machinery and transport equipment (weights 65 and 35 respectively).

The weights used in arriving at the combined index for Europe (based on steel consumption) are, for 1938 : Austria 1.3, Belgium 2.2, Czechoslovakia 3.2, Denmark 0.9, France 10.3, Germany : Western Zones 24.3, ceded territory 1.1 ; Greece 0.2, Ireland 0.2, Italy 5.2, Netherlands 2.4, Norway 0.5, Poland 2.4, Sweden 2.6, United Kingdom 20.7. In order to weight the quarterly indices, which are based on 1947 = 100, the 1938 weights were carried forward to that year by applying the annual index for each country.

(b) *Chemical Industry (Table III)*

Revisions and additions :

Austria :	<i>Statistical Annex to the Report of the U.S. High Commissioner.</i>
Denmark :	New index excluding paper and printing. The pre-war link was estimated.
Ireland :	Index for soap and candles, chemical drugs and fertilizers (weights respectively 21, 61 and 18).

The weights used in calculating the weighted averages for Europe are those shown in Table G of the *Economic Survey of Europe in 1948*. Austria and Greece were added with weights of 2.0 and 0.6 respectively.

(c) *Textile Industry (Table IV)*

The weights used in calculating the weighted averages for Europe are those shown in Table G of the *Economic Survey of Europe in 1948*. Greece was added with a weight of 0.3.

3. PRODUCTION OF MAJOR COMMODITIES (TABLES V-X)

All figures for pre-war production relate to the present territory of the countries concerned. The Saar, however, is included neither in Germany nor in France, but its production is shown separately in cases where the production of the Saar is of particular importance. The 1938 production figures for Germany by zones, which were estimated on the basis of 1936 production in the *Economic Survey of Europe in 1948*, have now, in most cases, been directly derived from published information. From this information (the sources of which are listed below where they differ from those previously used) it was also possible to calculate Polish production in 1938 within the post-war boundaries. Production data for the United Kingdom, which originally related to four-week or five-week periods, have been adjusted to calendar months.

In certain tables, the total for Europe is obtained by adding to the figures relating to the principal countries an item for "other countries". However, the composition of this latter group has been kept constant even where data for some principal countries are not available. In such cases, the European total is arrived at by approximate estimates of the figures for the missing countries, but these estimates are not included in "other countries".

The following additional sources were used :

(a) *Electric power (Table VI)*

Germany :	<i>Statistisches Jahrbuch 1938.</i>
	<i>Berlin in Zahlen 1947</i> , Hauptamt für Statistik, Berlin.

(b) *Motor vehicles (Table VIII)*

Italy :	<i>Industria e Commercio</i> , Ministry of Industry and Commerce, Rome.
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(c) *Building bricks (Table IX)*

The figures relate to total production of clay bricks for building purposes. They include ordinary bricks and ornamental or facing bricks. Glazed or enamelled bricks and refractory bricks are excluded. Production of bricks from shale, sandlime and concrete is excluded, unless otherwise stated.

In addition to the *Monthly Bulletin of Statistics*, United Nations, the following sources were used :

Austria :	<i>Statistical Annex to the Report of the U.S. High Commissioner.</i>
France :	<i>Etudes et Conjoncture.</i>
Germany :	<i>Report of the Military Governor (U.S. Zone)</i> <i>Statistique Industrielle Mensuelle.</i>
Poland :	<i>Wiadomosci Statystyczne.</i>
United States :	<i>Statistical Abstract of the United States.</i>

The table on the production of building bricks is published for the first time. Differences in definitions from country to country and differences in the size of bricks hamper the comparability of the figures more than in other tables. The totals shown in the table must therefore be regarded as representing only rough approximations.

(d) *Cement (Table X)*

Austria :	<i>Statistical Annex to the Report of the U.S. High Commissioner.</i>
Germany :	<i>Statistisches Jahrbuch 1938.</i> <i>Statistisches Handbuch von Deutschland.</i>
Italy :	<i>Annuario della Congiuntura Economica, 1938-1947, Istituto per gli Studi di Economia, Milan.</i>
Spain :	<i>Anuario Estadístico 1944-1945.</i>
United Kingdom :	<i>Monthly Digest of Statistics.</i>

4. EMPLOYMENT AND PRICES (TABLES XI-XIII)

(a) *Unemployment (Table XI)*

The sources and methods used in computing the data for Table XI are the following :

Austria :	<i>Monatsberichte des Österreichischen Institutes für Wirtschaftsforschung.</i> The unadjusted figures include only the recipients of unemployment compensation. The adjustment is based on the number of people registered at the Labour Offices, of which approximately one-quarter is stated as being employed but seeking a change of job (<i>Statistical Annex to the Report of the U.S. High Commissioner</i> , April 1949, page 43, Table 2).
Belgium :	<i>Bulletin de Statistique.</i> Totally unemployed only.
Denmark :	<i>Statistiske Efterretninger.</i> The adjusted figure relates to all categories of unemployed after deduction of those who remain unemployed for less than seven days.
Finland :	<i>Sosiaalinen Aikakauskirja.</i>
France :	<i>Bulletin de la Statistique Générale.</i> The unadjusted figures include only the recipients of unemployment compensation. The adjustment is based on the number of registered applicants after deduction of the (estimated) number of those seeking a change of job but already employed (<i>Deux ans d'Exécution du Plan de modernisation</i> , page 46).
Germany :	<i>Wirtschaft und Statistik.</i>
U.K./U.S. Zone :	<i>Wirtschaft und Statistik.</i>
Soviet Zone :	Report by the Deutsche Wirtschafts-Kommission.
Ireland :	<i>Irish Trade Journal.</i> The figures were adjusted to include unemployed domestic servants.
Italy :	<i>Rassegna di Statistiche del Lavoro.</i> The figure for the first quarter 1948 has been deflated by 20 per cent in order to exclude employed persons, pensioners looking for work etc. — categories which are not included in the figures for the fourth quarter 1948 and the first quarter 1949.
Netherlands :	<i>Maandschrift van het Centraal Bureau voor de Statistiek.</i>
Norway :	The unadjusted figures relate to insured workers (sick insurance) only. The adjustment for including non-insured workers has been estimated.

Poland :	<i>International Labour Review.</i>
Spain :	<i>Boletin de Estadística.</i>
Sweden :	<i>Sociala Meddelanden.</i>
	Trade union members only are included in the unadjusted figures, but non-members have been incorporated into the adjusted figures.
Switzerland :	<i>La Vie Economique.</i> Unemployed insured against unemployment.
United Kingdom :	<i>Ministry of Labour Gazette.</i>

(b) *Index numbers of employment (Table XII)*

Revisions and Additions :

Belgium :	The index numbers have been slightly changed by including employment in weaving and hosiery as published in the <i>Bulletin de Statistique</i> , instead of the estimates based on the percentage of unemployment in the textile industry, which were used before.
United States :	<i>Monthly Labor Review.</i> <i>Survey of Current Business.</i>

(c) *Wholesale Prices (Table XIII)*

Revisions and Additions :

Austria :	<i>Statistische Nachrichten.</i> Index numbers based on schilling prices in 1938 have been taken.
Belgium :	<i>Bulletin de Statistique.</i>
Netherlands :	<i>Maandschrift van het Centraal Bureau voor de Statistiek.</i>
Norway :	<i>Statistiske Meddelelser.</i>
Portugal :	<i>Boletim Mensal do Instituto Nacional de Estatística.</i>
Switzerland :	<i>La Vie Economique.</i>
United States :	<i>Survey of Current Business.</i>

In cases where the index numbers are based on years other than 1938, they have been shifted to that year by means of the pre-war index numbers taken from the same sources, unless otherwise mentioned in the footnotes to the table.

5. INTERNATIONAL TRADE (TABLES XIV-XVII)

(a) *Imports and exports of ten European countries according to origin and destination (Table XVI)*

This table shows the trade of ten European countries by areas using the same geographical groupings as in Table XVI "The Network of Europe's Trade by Individual Countries" in the *Economic Survey of Europe in 1948*. The figures have been derived from the trade returns of the European countries concerned. The differences between this table and that published in the *Economic Survey of Europe in 1948* are as follows :

- (i) Both import and export figures were taken as reported by the ten countries concerned, no account being taken of the data published by their trade partners.
- (ii) Imports are shown on a c.i.f. basis, exports on an f.o.b. basis. All data were converted into U.S. dollars at the official rates of exchange with the following exceptions :

France :	Exchange rates as given in <i>Le Commerce extérieur de la France métropolitaine en 1948</i> , février 1949, Ministère des Finances et des Affaires économiques.
Germany :	Exports for 1948 and 1949 and imports for 1949 have been taken from <i>Monatliche Aussenhandelsstatistik des Vereinigten Wirtschaftsgebietes</i> (given in dollars). In the case of imports for 1948, a different exchange rate was used for each quarter, derived from a comparison between the dollar and mark value of imports as published in the monthly reports of the Joint Export-Import Agency, and in the <i>Monatliche Aussenhandelsstatistik des Vereinigten Wirtschaftsgebietes</i> respectively. Adjustments have been made to ensure that the two sets of figures cover the same range of commodities.

Italy :

Exchange rates were obtained by comparing the value of imports and exports in lire and dollars, as published in *Statistica del Commercio con l'Estero*. It should be borne in mind that, as a result of fluctuating cross-rates during 1948, use of this average rate may lead to over-estimates or under-estimates of trade with particular countries.

(b) *Imports and exports of selected commodities (Table XVII)*

The figures have been derived from the trade returns of European countries. The exchange rates used were the same as for Table XVI. The definitions of the items are, in most cases, the same as those in Tables 48, 52 and 56 of the *Economic Survey of Europe in 1948*, the details of the changes and of the previous items which have been repeated being as follows :

- Item 1 : Table 48, items 1 and 2, *Economic Survey of Europe in 1948* (flour has been converted to wheat equivalent)
- Item 2 : Chapter 2, paras. 6, 7, 8 and 11 of the 1937 Geneva Minimum List
- Item 3 : Table 48, item 13, *Economic Survey of Europe in 1948*
- Item 4 : Table 52, item 1, " " "
- Item 5 : Table 52, item 2, " " "
(refined petroleum has been converted to its crude-oil equivalent)
- Item 6 : Table 52, item 9, *Economic Survey of Europe in 1948*
- Item 7 : Table 52, item 10, " " "
- Item 8 : Table 56, items 1-5 and 8, " " "
- Item 9 : Table 52, item 23, " " "
- Item 10 : Table 52, item 24, " " "
- Item 11 : Table 56, item 20, " " "

It must be borne in mind that it is not always possible to apply the standard definitions to the monthly data available for all countries.